DOCUMENT RESUME

ED 323 403 CE 055 813

AUTHOR Fisher, John; Holland, Diana
TITLE Training for Full-Time Officers of Trade Unions.
INSTITUTION Further Education Unit, London (England).
REPORT NO ISBN-1-85338-193-4
PUB DATE 90
NOTE 106p.
PUB TYPE Reports - Research/Technical (143)

EDRS PRICE MF01/PC05 Plus Postage.
DESCRIPTORS Adult Education; Content Analysis; Equal Education; Foreign Countries; *Job Training; *Labor Education; Models; *Needs Assessment; *Preretirement Education; Sex Fairness; *Staff Orientation; *Unions
IDENTIFIERS *United Kingdom

ABSTRACT

A study was undertaken to identify the training needs of full-time officers of trade unions in the United Kingdom. Data were collected through the following methods: individual interviews with senior officers of the Transport and General Workers' Union (TGWU) and other trade unions; a questionnaire mailed to every national, regional, and district officer of the TGWU; group interviews with new district officers attending a TGWU national course for officers; interviews with representatives of the TGWU Officers' National Committee; a literature search; and a content analysis of existing training and education provided for trade union officers. Based on the findings, a three-stage model for officer training was proposed. Stage 1 consists of preparatory measures, including formal commitment to training for officers, discussions between interview panels and officers, sessions to encourage more women candidates, national and regional preparation, and development of an officers' handbook. Stage 2 includes both regional and national induction. Regional induction consists of briefings on the role of the officer, introduction to district office procedures, a program of visits and observation, and introduction to the officer training program. National induction should be a mandatory 1-week residential course that covers the role of the officer, office management, law and tribunals, and communicating. Stage 3 consists of continuing education and updating and includes an assessment of training needs and general progress (after 9 months in post), attendance at national courses, and regional courses, and preretirement education. (Includes 32 references and appendices detailing current officer training and summarizing survey responses.) (CML)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED323403

Training for full-time officers of trade unions

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☒ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Lowe

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

CE055713

Training for full-time officers of trade unions

Project Consultant

John Fisher
Department of Educational Studies
University of Surrey

Project Research Officer

Diana Holland
Department of Educational Studies
University of Surrey

ISBN 1 85338 193 4

© Further Education Unit 1990
Reproduction in whole or in part of the contents of this publication is authorised for all non-commercial educational purposes, provided the source is acknowledged. Copies made for such purposes should not be recorded as part of any licensed copying scheme. All rights reserved with regard to commercial reproduction of the contents.

RP436

Printed by Blackmore Press, Shaftesbury, Dorset

Contents

Foreword v

Project Steering Group vi

Abstract vii

1. **Terms of Reference** 3
   Research Aims and Objectives 3
   Background to the Research 3

2. **A General Picture of Officer Training: Evidence from the TUC and Individual Unions** 16
   Pressures for Improved Training Support for Union Officers 17
   Induction 18
   Updating and Continuing Education 19
   Computerisation 21
   Senior Officers 22
   Funding for Officer Training 22

3. **Evidence from TGWU Regional Administrative Officers, Educational Specialists and National Officers** 23
   Senior TGWU Officers Interviewed for the Research 23
   The Scope of the Interview 26
   Types of Training 26
   The Officer's Role and Appointment 27
   The Current Training Position 27
   General Proposals for Officer Training 28
   Detailed Proposals for Officer Training 30
   Release and Cover 31
   Possible Provision Structure 31
   Senior Officers' Views on Research Support, Computerisation and Technical Change 32
   Regional and National Officers' Views on Women Officers 33

4. **Full-time Officers' Training Requirements: Survey of TGWU Regional/District Full-time Officers' Views** 34
   Distribution of the Questionnaire 34
   Scope of the Questionnaire 34
   Analysis of the Questionnaire 35
   Training for Full-time Officers: Views of Officers Attending the TGWU National Induction Course 44
   Views of the TGWU Officers' National Committee 49
   Training for TGWU National Officials: Views of National Officials and the National Officers' Committee 52

5. **Conclusions and Recommendations: A Curriculum Model of Training for Full-time Officers of Trade Unions** 55
Stage 1: Preparatory Measures 56
Stage 2: On Appointment 57
Stage 3: Continuing Education and Updating 58
Future Developments in Training for Full-time Officers 60
Research Back-up and Computerisation 61
Training for Senior Officials of Trade Unions 61
Implementation of the Curriculum Model of Training for Full-time Officers of Trade Unions 62

References and Selected Bibliography 64

APPENDICES 67

A: Current Officer Training Provision 67

B: TGWU Officers' Backgrounds 78

C: Officers' Views on Subjects for Induction Training, Updating and Continuing Education 84

D: Computerisation: Research and Information Back-up for Union Officers 88

E: Women Full-time Union Officers 91

F: Training and Back-up for Senior Union Officials 92

G: Research Method and Procedure 94

Foreword

This report is a summary of research carried out during a Further Education Unit PICKUP project (RP436) conducted between June 1987 and June 1988 by John Fisher and Diana Holland of the Department of Educational Studies at the University of Surrey.*

The project was undertaken in association with the Transport and General Workers' Union, the largest and most diverse trade union in the UK. The report proposes a model for officer training including provision for continuing education and updating with regular assessment of training needs. A formal requirement for course attendance of two weeks every five years is suggested. This is a modest proposal which would, nevertheless, if mandatory in all professional areas, be extremely costly whilst still leaving this country lagging behind some of our industrial competitors. Not only is it necessary in the trade union area to have staff regularly updated on legal and technical matters, but also throughout professional, industrial and commercial fields. It is to be hoped that Training and Enterprise Councils will give attention to this for managers and workers alike and make it a priority for development in the immediate future.

This report is commended to all interested in continuing professional development issues as well as those with more specific interests in the trade union field.

Martin Johnson
Principal Officer
Further Education Unit

* Copies of the full report can be obtained from:
Dr J P Fisher, Department of Educational Studies, University of Surrey, Guildford GU2 5XH.

Project Steering Group

Don Jarvis	PICKUP Regional Development Agent
Frank Cosgrove	Director of Studies, TGWU
Harry Moore	Education Officer, TGWU
John Hobrough	Department of Educational Studies, University of Surrey
John Fisher	Project Consultant
Diana Holland	Project Research Officer.

Secretary:

Jenny Grey	Department of Educational Studies, University of Surrey

Abstract

1. This research project was established to identify the training needs of full-time officers of trade unions, in recognition of the key position they hold within industry.

2. The research findings have been drawn from information collected from a range of unions, with more detailed research concentrating on the Transport and General Workers' Union (TGWU), the largest and most diverse trade union.

   The research included:

   - a series of individual interviews with senior officers of the TGWU and other trade unions and the Head of the TUC's Education Department;
   - a survey of full-time officers' views through questionnaires sent to every National, Regional and District Officer of the TGWU;
   - group interviews with new District Officers attending a TGWU National Course for Officers;
   - interviews with representatives of the TGWU Officers' National Committee and National Officers' Committee;
   - a literature search and a programme content analysis of existing training and education for full-time officers of trade unions provided by individual unions and the TUC.

3. The scope of the research findings covers a wide range of issues including:

   - the appointment and role of the full-time officer;
   - changes in the officer's role;
   - the importance of training to the role of the officer;
   - an evaluation of current training for full-time officers of trade unions.

4. The research findings provide the basis for detailed proposals for a system of training for full-time officers and proposals for the transferability of this curriculum model to other trade unions.

1. Terms of reference

RESEARCH AIMS AND OBJECTIVES

Full-time officers of trade unions are in a key position within industry in the United Kingdom (UK). On the one hand, their involvement with the implementation of technical and social change in industry and commerce, and with 'change at work', has a crucial effect on the development of society generally and of the working conditions of the population as a whole; and yet, on the other hand, their specific training needs are not known.

This research project aimed to identify the training needs of full-time officers of trade unions through a series of interviews with senior trade union officials and a study of trade union officers — mid-career employees — in the largest and most diverse trade union in the UK, the Transport and General Workers' Union (TGWU).

The research was carried out by the Department of Educational Studies at the University of Surrey, in collaboration with the TGWU and other unions, for the Further Education Unit (FEU), as part of the Department of Education and Science PICKUP scheme, covering professional, industrial and commercial updating.

Specifically, the project aimed to:

- identify current officer training provision in the TGWU, TUC and other major unions;
- examine the appropriateness of such training overall for the officer's role and in the light of technical and social change in industry and commerce;
- develop a curriculum strategy applicable to trade unions, which could be implemented in the training of full-time officers of trade unions.

The research method and procedure are outlined in Appendix G.

BACKGROUND TO THE RESEARCH

Full-time officers of trade unions

There are approximately 3,000 full-time officers of trade unions (TUC Organisation Department, June 1988).

Trade union officers are professional salaried employees with career structures. They are key organisers within trade unions, with an essential role to play if trade unions are to be involved as active agents for innovation and change.

The main functions of trade union officers are:

- to service and represent the union members;
- to organise and recruit new union members;
- to represent and put forward the policies of the union.

Within this framework, full-time officers of trade unions are involved to varying degrees as negotiators, advisers and specialists. They also have a range of administrative duties, and most officers have some responsibility for secretarial or other support staff.

In the last major study of training for trade union officers, carried out in 1970 by the University of Warwick on behalf of the TUC, the following specific duties were outlined (TUC, 1972, p.5):

- recruitment of members;
- supervision of union branch administration and finance;
- negotiations with management at the workplace;
- recruitment and support of shop stewards;
- attendance at meetings of negotiating or consultative bodies;
- attendance at union meetings and conferences;
- handling of legal matters;
- representation of the union with government planning, economic and social agencies;
- representation of the union on industrial and social insurance tribunals;
- carrying out of routine office work;
- participation in trade union education and training.

These same duties were again outlined in research into training specifically for TGWU full-time officers, carried out through a study of two of the Union's 11 regions in 1983 by Ruskin College on behalf of the TGWU:

> '. . . a District Officer has a key role to play in the Union's administration and communication between the regional level on the one hand and the local level of the branch, shop steward and member on the other. It also emerged that, in both regions surveyed, District Officers were required to undertake

> a very diverse range of activities, including recruitment of members, servicing shop stewards and other union representatives, negotiating with management, handling union matters, attending union meetings and carrying out office management.' (TGWU, 1984.)

This research was concerned to highlight the conflicting demands placed on officers, and the specific dilemma for officers when faced with change and modernisation.

In *An Enquiry into Full-time Officering and its Problems* in 1977, Noll identified two aspects of the conflicting demands placed upon officers at that time, both by the need to recruit and therefore service increasing numbers of members:

> 'Even with the knowledge that the more he [sic] recruits the more he has to service, the Officer still strives for increases.' (Noll, 1977, p.5.)

and by the growth in importance of shop stewards within the trade union movement. A TGWU guide to the *Union in Action* (1972) described this development:

> 'We want workers to have their own agreements. This means that shop stewards must be able to carry out their own negotiations. The Full-time Officials will be there to advise and help if necessary.' (TGWU, 1972, p.11.)

The role of the full-time officer as a force for initiating, responding to or opposing change is an important aspect of the position of full-time officers of trade unions. In the conclusion to his study of *The Workers' Union* (1971), Richard Hyman draws attention to the essential dilemma facing full-time officers, which he sees coming from:

> '. . . the reformist nature of trade unionism itself. It is rare indeed for trade union commitment to major social change to be an operational one, in the sense of influencing day-to-day industrial policies for serious long-term strategies . . . [particularly where] . . . the union has achieved a status in society.' (Hyman, 1971, pp.198-9.)

In this case, where the union is 'established', Hyman refers to Wright Mills' definition of the 'labor leader' as 'a manager of discontent' (Wright Mills, 1948) and to Coser's definition of institutions such as unions as moderators of conflict, which therefore effectively stand in the way of change:

> 'Social Systems provide for specific institutions which serve to drain off hostile and aggressive sentiments. These safety-valve institutions help to maintain the system by preventing otherwise probable conflict or by reducing its disruptive effects.' (Coser, 1956)

The dilemma confronting full-time officers of trade unions in terms of priorities is evident from these definitions. In protecting and representing existing members' interest in the short term, the full-time officers' role may be in conflict with the need to extend the union's membership and position, and to push for wider change in the long term.

This conflict was identified in the conclusions to the study of factors determining relationships between shop stewards and trade union full-time officers by Whitehouse in 1973:

> 'Thus, whilst the steward, in the short term, thinks only of his [sic] immediate problem and membership needs, the Full-time Official *ought* to be seeking to co-ordinate a long-term strategy for all his members . . . but since so many Officers, because of pressure of work, are "problem solvers" rather than "negotiators" or "organisers" (i.e. they handle issues on an *ad hoc* basis) such long-term planning is virtually impossible. This spells potential dangers for a large union unless it can give more attention to the fusion of individual workplace needs with the aspirations of the whole union movement.' (Whitehouse, 1973, p.33.)

Effective organisation of the union in the face of major change and modernisation clearly points to the need for union officers to have a developed understanding and awareness both of the changes and of the unions' and the officers' role in relation to these changes. It is this aspect of the role of trade union officials and their training requirements which was identified as being particularly important throughout this research.

What became evident from the research is the enormous pressures for change which unions are undergoing, not only in the areas of loss of membership and influence, but also in the field of their fundamental relationship with their members and other employees in industry, commerce and services. One of the principal areas of change is technological development, and union officers are continually being drawn into this process and its effects.

Pressures for change

The pressures for change in the provision of training for full-time officers are threefold:

- changes within the unions themselves;
- changes in industry and employment;
- changes in industrial relations.

Changes within unions

Most major unions are modernising themselves, and computerised information and membership systems are becoming increasingly common. The need for this computerisation to be effective in providing back-up support to officers clearly points to a need for training for officers in the use and benefits of computerised systems.

Further, most unions, as a result of declining membership in the traditional areas of union organisation, are involved in major recruitment initiatives, and are looking for trade union officials to extend their organisation and recruiting role. The specific problems associated with these initiatives are outlined in a paper produced for the TUC by Edmund Heery and John Kelly in November 1987; this again identifies particular training needs:

> ' . . . our evidence indicates that unions face serious constraints in mobilising their Officials for sustained recruitment campaigns. These constraints include heavy workloads, Officer commitments to their existing membership, reward and control systems designed for priorities other than recruitment and lack of appropriate training and experience.' (Heery and Kelly, 1987.)

Changes in industry and employment

Officers are continually drawn into situations of modernisation and restructuring. New demands for innovation and new perspectives are continually required of them as leaders.

Management of change is becoming an increasingly significant factor with industry, as identified in the following article aimed at managers:

> 'If only one in three of the world's top industrial companies will still be leaders in their sector ten years hence, what will set them apart from others

who will fall by the wayside? The answer, according to Julian Phillips, a principal at McKinsey's Consultants' San Francisco Office, has to do with their ability to manage change. Conventional management disciplines will not be good enough to dominate the turbulent economic and technological changes that will increasingly pervade virtually all sectors, says McKinsey.'

('Trends in the Workplace: Successful Change Managers,' *Financial Times* (England), from *Manpower Argus No.218*, Nov. 1986.)

In many cases, the pressures of change within industry and employment are used as a basis for challenging traditional trade union approaches to negotiation and representation. The following report of a statement from Alistair Graham, Director of the Industrial Society, highlights this kind of pressure on trade unions as a whole and on trade union officials in particular, as representatives of trade unions:

'He [Alistair Graham] warned that, unless unions showed readiness to accept change, and encourage their members to co-operate in measures to make their firms competitive abroad, employers might question the need to involve them in the management of change.

Union Officials needed to be trained in negotiating for training policies, so that their members could develop marketable skills, rather than concentrating on pay and conditions. And unions now had to try to square the difficult circle between individualism and collectivism if they were to survive.'

('TUC Urged to Become Referee in a Union Transfer Market', *The Guardian*, 20 July 1987, p.2.)

Clearly, both these statements represent a powerful challenge to trade unions and to their role as representatives within a changing industrial environment. Expectations are being placed on full-time officers of trade unions which constitute an important pressure for change in the training and other support provided.

Changes in industrial relations

Recent legal and social developments have produced a new situation, in which modern management techniques, employee involvement and changes in the way unions conduct their affairs have produced new demands on the union officer.

The training and other requirements of union officials associated with such changes are highlighted in the following extract from the 1985 Hitachi Lecture, given by Sir Adrian Cadbury, looking at industrial relations in the 1980s:

> '. . . trade unions can increase their influence over site negotiations by upgrading the services which they provide to their members. Site representatives want to retain control over the bargaining processes, but, to do that, they need training in knowing what information to seek and how to display it. There is, therefore, a potential demand for union consultancy and training services. In addition, site representatives need professional advice in such fields as health and safety and the legal aspects of employment, all of which have become increasingly complex. There need be no lack of demand for outside trade union services, but they will require a higher degree of professional skill and training. The importance of attracting and holding people with these attributes represents a further pressure on trade unions to amalgamate, in order to reduce the duplication of services within the trade union movement as a whole, and to provide better career structures for the staff concerned.' (Cadbury, 1985.)

Again, this extract constitutes a distinct challenge to trade unions and their officials, and to their position with the bargaining process, in the light of changes in industrial relations. Such developments are clearly exerting important pressure for change in the nature of training and back-up services provided for full-time officers of trade unions.

If officers are to offer responses, beyond the negative or merely passive, to the above changes in union organisation, in industry and employment and in industrial relations, then new training provision for officers needs to be examined in the following areas:

- their needs as *employees* coping with technological change and the new procedures of union government and administration;
- their needs as *initiators of technical and social change*, and as communicators with large numbers of people who themselves are involved in work modernisation;
- their needs as *professionals*, coping with career development and new legal, technical and social climates of opinion.

The TGWU officers were asked about their views on the role of officers in the modernisation of industry and about what scope there was for training in this field.

Generally, they identified the key paradox that union officers supported change and modernisation on the one hand, but were charged with defending members from the effects of these same changes on the other:

> 'Officers are not directly connected with industrial modernisation, but with defending and improving members' terms and conditions. We are very much a defensive mechanism, but that defence forces employers to improve and modernise and we are then involved again, improving and defending members' terms and conditions. However, officers should have political and economic understanding of the framework within which modernisation falls and be aware of the technologies involved. They must be able to cope with negotiations involving "modernisation" and be equipped with alternatives if necessary'.

> 'The role of the full-time officer in industrial modernisation is to be part of the industrial and commercial development, striving all the time to spread around all that is available — reducing the number of hours worked and working towards industry being administered by us, for our benefit.'

This paradox was evident from the survey of TGWU District and Regional Officers' views. Whilst the *lowest priority* identified by officers when faced with industrial modernisation was:

- pushing for industrial modernisation on behalf of the membership.

the *highest priority* was:

- understanding technological changes and keeping the membership informed.

> 'Sometimes our desire to protect people at all costs makes us forget our long-term aims. As an officer, you are dealing with real people, losing their jobs, but we also have to look at how we can create prosperity long-term for future generations.'

> 'The officer's role is to ensure that, where companies undertake modernisation and it affects the members, that they see the members are protected. There is a need to stop thinking we can tell companies what they can and can't do — it's *the way we challenge* that is important for the future. Union Officers must never forget that the union is in existence to represent working people.'

It was felt that, in this process, knowledge of industrial changes was important *in a number of fields:*

> 'Officers must know what their industries are all about. We have not moved on in this area, and often officers rely on management for technical information updating. This is a danger. We should invest more in showing officers what is going on in different industries.'

Officers ran the risk of becoming isolated from the latest developments in industry:

> 'With regard to technical change, the officer should be educated on this issue, otherwise s/he cannot advise his/her members and they are forced to rely on management for information. The result is a lack of union-based ideas and a defensive response, lacking in positive alternatives. Officials need to be pro-active.'

In their view, lack of knowledge reduced the involvement of the officer in a number of ways:

- It placed the officer in a more difficult position to defend his/her members:

  'The real problem of technology is control and using it for the benefit of all the people. The message has got to be got across to officers so that they can pass it on to the membership.'

  'We can't just respond to a situation that has developed. In future, we need to know/anticipate what is to take place in industry, and to keep the membership informed of what developments will be.'

- It was felt that the 'organic link' with the members should be particularly strong during periods of technical change:

  'There is a role for the union, and for officers, in the new industry that is coming about. Officers need to:

  — recognise that they're not going to stop the change;

  — make sure they don't completely accommodate themselves to it.'

- It reduced the scope for the officer to introduce *alternatives* to the employer's proposals on technical change:

'The union official should be a motivator and innovator with a deep understanding of trade union objectives.'

'Officers have got to push for more industrial democracy, more involvement with lay members and take decisions about finances. We need *not* to become business agents like the EETPU officers or US unions.'

'This industrial revolution means officers need to identify key areas to gain the muscle to get what we want — the shorter working week, time off for study etc.'

There was even, in some circumstances, a role for the officer to become an *initiator* of change:

'There will also be times when there is a need for the officer to be looking to encourage management's capital investment in new technology for the long-term security of employment of our members. The introduction of new technology should take cognisance of the needs of people working in the place and should be conscious of the responsibility of the enterprise to the local community.'

This was becoming more difficult as management itself was changing:

'It is important to look at what officers are matched against on the employers' side. There is a new breed of highly educated, younger, laid-back, cold, impersonal types across the table, who are not impressed by huffing and puffing. An age, skill and culture gap is now the model identified by the other side. It did not used to be there.'

In all this, there was an important role for training and, in particular, for education of officers:

'Officers need expertise to get into new areas. There is a danger they are being left behind . . . They need higher level *specialist* training and this should be extended to areas like computers and new technology . . . Union education is vital. This has been the biggest failing in the past. Work has been changing. We run campaigns, but officers are not taught how to do it. Campaigns come to them as *instructions* not via education.'

'Education should prepare the officer to have a more significant response: they tend now to fall back on traditional responses.'

A specific area for such education was the examining of the role of trade unions in the new circumstances, and the best way to encourage that role:

'The problem is that people think that this is the same organisation that it was 20 years ago. If we don't help officers to understand the changes, then we will be marginalised, not only by unions, but also by employers.

'We need to be challenging the "in-house" tactics of getting workers to presume that trade union membership is of no value, as things can be dealt with in-house by an apparently benign and benevolent management structure . . .

'In 1950, there was 51% union membership in the USA. Today it's at 19%, and there's nothing to say that what goes down must go up. The same conditions are happening here.'

It was felt to be important to bring national recruiting campaigns, such as the TGWU's 'Link-up', down to the Regions to develop the most appropriate and effective strategies for implementing such campaigns at local level:

'There is a new role of Executive Officers and National Trade Group Secretaries in developing regional strategy in line with national policy — calling together officers and leading activists and holding courses along these lines.'

In general, an understanding of the way society was changing, economically and politically, was essential:

'Officers should be going beyond mere terms and conditions of employment to look at the whole organisation of business, including multinational companies. For this, training needs to be more sophisticated.'

The issue of technical change and modernisation, therefore, highlighted the wider training needs of officers in the TGWU and in other unions. Officers did feel that these were key issues facing them at this time and in the future, and also showed an awareness of the need for training and education in relevant areas.

It was clear, however, that there had been little research into their *precise* requirements and also into which particular training and education strategies would be most appropriate in assisting them to confront these problems. In practical terms, the day-to-day demands of the typical officer's job also prevented him or her from taking the initiative in developing self-education, or perhaps spending a great deal of time in putting pressure on their organisation to deal with these issues.

Background and appointment of trade union officers

In the main, trade union officers are appointed to their position, usually by an elected body made up of lay union members. However, some unions do operate an election procedure for selecting their full-time officers.

Whether officers are appointed or elected, criteria for their selection are most likely to include:

- commitment to the union and/or the trade union movement;
- proven record with the union and/or trade union movement;
- industrial/working experience relevant to the particular union (usually in one industry).

Formal and professional qualifications are not normally given a high priority in the selection of full-time officers.

Generally, criteria such as 'innovation' and commitment to development and change will be excluded from the selection process, with a premium more likely to be placed on the role played in the past by the officials of that union in carrying out their functions and in implementing the policy of the union.

The 1972 TUC research into training for full-time officers highlighted the following criteria as being most important to unions in the selection of their full-time officers:

- personal attributes to include a strong personality, integrity, leadership skills and intelligence;
- a strong motivation and identification with trade union objectives;
- knowledge of, and experience in, the union itself;

- sufficient acquaintance with industrial relations matters generally;

- administrative skills. (TUC, 1972, p.9.)

Earlier research had shown that, in practice, the 'typical trade union officer' was male, had left school before the age of 16 without any formal qualifications, had previously worked as a skilled or semi-skilled worker and had experience as a workplace union representative and/or as a branch official (see Clegg et al., 1961; TUC, 1972). The research carried out for this report has shown that this picture is still generally true (see Appendix B and Chapter 2-4).

In practice, therefore, it is likely that all trade union officials will be called upon to carry out duties and to represent workers in industries and/or workplace that they have no first-hand experience of dealing with.

Training for full-time officers of trade unions

Research carried out in the 1960s and 1970s highlighted the need for training for full-time officers:

> 'If training . . . could be provided, trade union Officers could do a better job . . . and trade union Executives might ponder whether they do enough for their Officers in this respect.' (Clegg et al., 1961, pp.229 — 30.)

> 'The justification for developing training for trade union Officers is that training can assist Officers to discharge their trade union duties more efficiently. For this reason, the training provided must be based on an examination of the duties that Officers undertake, in order to identify those areas of knowledge and skill in which Officers find most difficulty in their work, and from this to determine in which subjects training can be of greatest value.' (TUC, 1972, p.4.)

> 'The main points show themselves . . . firstly, the enormity of the Officers' workload and secondly, the seemingly impossible situation which most of the Officers find themselves in when trying to perform their role without adequate education and training.' (Noll, 1977, p.46.)

The TUC research (1972) showed that, out of 29 unions surveyed, 22 provided no systematic training for first-line officers, and, of the 7 unions that provided any training, this was mostly only available for new officers. Most unions, it was shown, relied solely on courses for officers provided through the TUC, with little specific commitment to officer training from the officer's own union itself, in terms of release/cover or course provision.

In the main, this system has prevailed, and existing officer training provided by unions has been training into already established practices, and has been non-continuous. Pressures are currently being exerted on this pattern of training by changes within industry and within the unions themselves. Chapter 2 of this report outlines current training provision for officers in 12 individual unions and the TUC's officer training programme. Chapters 3 and 4 look in detail at the TGWU's officer training provision.

Current training for full-time officers is financed by the unions themselves.

The TGWU

The TGWU is the largest and economically the most important trade union in the UK. It has a membership of 1.3 million and 550 full-time officers, each responsible for approximately 2,500 members.

Formed through the amalgamation of 14 national unions in 1922, the TGWU has continued to develop through amalgamations with other unions as well as through direct recruitment initiatives.

The Union is organised into 7,800 branches, based on workplaces and areas, and its policy and rules are decided on a democratic basis by conferences of delegates from the lay union membership. The Union's structure — 11 geographical regions and 14 industrial Trade Groups — reflects the diverse nature of its membership.

'Change at work' is affecting every industry represented by the TGWU, as well as the TGWU's organisation as a whole:

> 'In the past six years, we have lost 400,000 members. Job losses have taken place in many of the areas where we have been traditionally most firmly entrenched. We must recognise that the face of the workforce is changing . . . manufacturing will not provide the proportion of jobs which we have known in the past. More of the jobs will be white-collar. More will be in service industries. More women will join the workforce, and, in the near future, more jobs will be part-time.
>
> 'Our response to this challenge must be vigorous, well-considered and imaginative.'
>
> (Ron Todd, General Secretary of the TGWU, *T&G Record*, August 1986.)

TGWU officers, as key organisers within the Union, are increasingly placed in the forefront of such industrial change.

They organise new groups of workers in new working situations and represent new members on new issues, whilst also protecting and servicing the traditional membership, often in a climate of rationalisation, deregulation and intensive technological development. At the same time, the TGWU itself is computerising its information and membership systems.

The Union, and consequently its full-time officers, is faced with a dilemma: on the one hand, it supports technical progress and change, while, on the other, its role is to protect current members' jobs and conditions. Ron Todd, General Secretary of the TGWU, summarised the current issues facing the Union in outlining the Union's policy on the proposed Ford plan at Dundee:

> 'The TGWU . . . is committed to a genuine "New Unionism", using modern methods without betraying traditional values.
>
> '. . . . Our Union must be relevant to the needs of its members whilst remaining conscious of new trends in industry and society.
>
> 'But, being conscious of new trends, even unfavourable ones, cannot mean retreating before them.
>
> 'The "New Unionism" is a tall order in these hostile times, but a great and modern Union like the TGWU is a match for the task.'
>
> (Ron Todd, *T&G Record*, April 1988, p.1.)

The Union's full-time officers will be key in making the TGWU a match for the task identified by Ron Todd from the TGWU's policy-making conference decisions; and a study of the role and training requirements of these officers has a wider significance and implications for the trade union movement as a whole.

2. A general picture of officer training: evidence from the TUC and individual unions

This chapter considers the views of senior officials responsible for the training and education of full-time officers at the TUC and in 12 individual unions: AEU, ASTMS, FDA, FTAT, GMB, IPCS, NALGO, NUPE, SOGAT '82, TASS and USDAW, as well as the TGWU. (*NOTE*: ASTMS and TASS are now part of MSF, and IPCS is now IPMS.)

Interviews were held with:

Alan Grant	Head of the **TUC** Education Department
John Mann	Education Administrator for the **AEU** (Amalgamated Engineering Union)
Sarah Howard	Director of Education for **ASTMS** (Association of Scientific, Technical and Managerial Staff — now part of MSF, Manufacturing, Science and Finance)
John Lloyd	National Education Officer for the **EETPU** (Electrical, Electronic, Telecommunications and Plumbing Union)
Derek Stubbs	Assistant General Secretary of the **FDA** (Association of First Division Civil Servants)
David Coates	National Officer and Trade Organiser for **FTAT** (Furniture, Timber and Allied Trades Union)
Meg Tritton	Co-ordinator for Regional Education in the **GMB** (General, Municipal, Boilermakers and Allied Trades Union)
Valerie Ellis	Assistant General Secretary for the **IPCS** (Institution of Professional Civil Servants) (now the IPMS, Institution of Professionals, Managers and Specialists).
Regina Kibel Arthur Presswell	Education Officer *and* Assistant Education Officer for **NALGO** (National and Local Government Officers' Association)

Jim Sunderland	Education Officer for **NUPE** (National Union of Public Employees)
Mike Molloy	Head of Research and Education for **SOGAT '82** (Society of Graphical and Allied Trades)
Peter Duffy	Organiser for **TASS** (now part of MSF)
Colin Thorne	Education Officer for **USDAW** (Union of Shop, Distributive and Allied Workers)

The unions interviewed for the research represent a mixture of large and small unions, white-collar and manual, single-industry/sector and general unions, in both the private and public sectors.

The interviews covered the following subjects:

- pressures for improved training support for union officers;
- induction;
- updating and continuing education;
- computerisation;
- training for senior officers;
- funding for officer training.

PRESSURES FOR IMROVED TRAINING SUPPORT FOR OFFICERS

In the group of trade unions surveyed, the majority were not satisfied with the current level of officer training provision.

Pressures for change were identified as coming from a variety of sources:

- officers themselves;
- the increasing legal and benefits knowledge required by officers;
- technological change;

- the increasing importance of recruitment and organisation;

- union conference decisions.

Those unions concerned to improve officer training emphasised the need for *a central policy commitment from the union itself*, along with systematic arrangements for release and cover for officers.

There were very few examples of an integrated officer induction programme, and most unions provided no systematic induction for their officers. Most unions, including the TGWU, have a partial programme. Some, like NALGO, have a 'needs assessment programme' upon which they attempt to build their training programme, both induction training and continuing education.

INDUCTION

There are very few examples of an integrated officer induction programme from Day 1. The majority of unions provide no induction training or support for officers at all.

Two of the examples of training at the induction stage involved courses run before the officer takes up his or her post:

- *The EETPU Assessment Course* ensures that all officers on the short-list have gained skills, experience and awareness of current issues facing the Union.

- *The NUPE Panel Induction Course* is similar, although it is more directly related to the practical aspects of an officer's role.

In both cases, officers have several months or longer to familiarise themselves with their local office. However, this may not be the office they will be based in.

As a small union, with few officers starting at any one time, FTAT has been able to organise two weeks' intensive induction training (in conjunction with the Industrial Society) that is specific to the new officers' background and training needs.

NALGO, through its Training Needs Assessment Programme is committed to meeting all staff training needs following the assessment. USDAW provides a specific one-week induction course for new officers. In both cases, however, it will be likely that officers will have been in post for a while before training takes place.

Apart from courses, a number of unions operate a system of Trainee/Probationary/Assistant Officers, who are generally allocated to work with another officer and expected to spend the time before they become full-time officers learning the different aspects of the job. However, no union operating this system identified any formalised induction programme attached to this 'learning' stage.

Key issues for induction identified from the interview were:

- the importance of an integrated induction, involving courses, 'hands-on' experience and introductions to the union's services, departments etc;

- the necessity for officers' training needs at induction to be clearly identified: skills, information, and awareness.

UPDATING AND CONTINUING EDUCATION

The majority of unions covered by the research did not have a structured system of updating and continuing education for officers.

It was generally stressed that such a system is most effective when there is:

- a central commitment from the union to officer training;

- a system of release and cover for officers involved in training;

- a procedure for identifying officers' training needs .

Most commonly, training for officers consisted of a combination of on-offer courses provided by:

- *the union itself*, often for lay representatives as well as full-time officers;

- *the TUC*, through its courses for union officials and staff, particularly courses covering the law, teaching methods, social benefits and using the media;

- *professional training organisations*, particularly covering administrative skills, such as time management, speed reading, etc.

TUC courses were generally viewed as playing a role within most unions' officer training provision. However, this method of provision was found to be inappropriate for:

- union policy and strategy issues;
- courses required for all officers over a short period of time;
- keeping officers up to date on a regular and systematic basis.

Some concern was expressed as to the appropriateness of some of the TUC course activities and organisation for experienced trade unionists. The TUC itself identified the need for both TUC and single-union officer training provision. Current TUC courses for union officials and staff are organised into five main areas:

- education and campaigning skills;
- building union organisation;
- using the law;
- bargaining and research;
- pensions.

Provision on a self-selecting basis was generally found to be inadequate, as it does not address problems of time and cover for officers on courses, nor does it encourage attendance at courses as an integral part of an officer's job.

NALGO's Annual Training Needs Assessment based on Job Profiles was the only existing system referred to during the interviews which tackled these issues. It is worth noting that both the EETPU and GMB expressed specific interest in introducing a regular system of 'profiling/assessment' of officers' training needs, to form the basis of future officer training provision, and that the IPCS identified a possible 'consultancy' role for the TUC in this area. In the absence of such a system, most unions appear to organise officer courses on an irregular basis, when a particular need is identified: e.g. recruitment, teaching methods, media, pensions, equal opportunities.

Those unions with more developed experience of officer training provision emphasised the need for courses in a range of areas:

- *functional* (e.g. legal, benefits, finance);
- *skills* (e.g. media, computing, office);
- *awareness* (e.g. political, economics, technology, equal opportunites).

It was also stressed that officers require a high level of specialised knowledge and that the careful selection of tutors was very important.

Some specific comments about the benefits of a union running its own provision, or having courses tailor-made to the union's own needs, were made, although it was also seen that attending courses with officers from other unions can have benefits.

A number of unions, although not having a comprehensive system of continuing education, did outline organisational procedures involving regular policy updates and briefings from senior officers of the union (e.g. TASS).

COMPUTERISATION

Most unions covered by the research were in the process of computerising their administrative systems, or had already done so.

Technology training and training for computerisation of the union were identified as very important, particularly for officers who had worked for the union for several years to update their knowledge.

There appeared to be no uniform training in computerisation for officers. Provision included:

- *ASTMS*: courses organised with a college of further education;
- *EETPU*: technology training at its Vocational Training Centre;
- *FDA*: training from the manufacturers of the union's computer system;
- *AEU*: open learning packages;
- *NUPE*: internal weekend briefing.

Interest was expressed in the TUC's 'Using Computers' course, but interviews were carried out too early into the introduction of this programme for any use to be reported.

It was generally seen that officers have an important role to play in industrial modernisation and that training for this role is important. It was felt that officers need to be:

- aware of technological change within industry;
- able to use the latest technology effectively in carrying out their responsibilities.

The use of computer-aided learning was also put forward as a useful form of training for officers and it was suggested that centralised officer training programmes covering a range of issues could have an important role to play.

SENIOR OFFICERS

Several points were made about the importance of training support for senior union officers. Such training, it was felt, should cover:

- familiarisation with the new areas of responsibility as soon as possible through induction;
- specific training in, for example, interviewing and recruitment of staff, managerial skills;
- a facility for ensuring senior officers are kept up to date with technological, legal and other industrial matters.

Only the NALGO system of 'Training Needs Assessment' appeared to provide any kind of facilities for senior officers in a structured way.

FUNDING FOR OFFICER TRAINING

It was seen by most unions that a commitment from the union itself towards providing resources for the training of its officers was crucial. However, the point was made that public funding is provided for management training. Concern was expressed that any publicly available funds should not be linked to specific types of training (see also Appendix A, 'Current Officer Training Provision').

3. Evidence from TGWU Regional Administrative Officers, Educational Specialists and National Officers

This chapter considers the views regarding the role of union officials and the relevance of training to their role of:

- Regional Administrative Officers of the TGWU;
- Regional Education Specialists of the TGWU;
- a group of relevant TGWU National Officials:
  - the Assistant General Secretary (Eddie Haigh);
  - the National Secretary for Education and Research (Regan Scott);
  - the Director of Education (Frank Cosgrove);
  - the Education Officer at the TGWU Eastbourne Centre (Harry Moore);
  - the National Secretary: Women (Margaret Prosser);
  - the Administrative Officer (Ray Collins).

SENIOR TGWU OFFICERS INTERVIEWED FOR THE RESEARCH

Regional Administrative Officers are the senior officers of each Region of the TGWU, and represent the immediate superiors of District Officials in the organisation.

Regional Education Specialists are themselves of District Officer grade, but are charged with organising education and training within their Region, and with providing students for the national education programme.

Eddie Haigh was interviewed as the Executive Officer responsible for Education. This responsibility has since been allocated to Bill Morris, Deputy General Secretary. Regan Scott is National Secretary with direct responsibility for Education and Research, and in practice is the organiser of the Union's

research provision. Frank Cosgrove, as Director of Education, oversees in practice the National and Regional provision of education in the Union. Harry Moore is the Education Officer with responsibility for organising and carrying out national courses at the Union's Education Centre at Eastbourne.

These categories of officer, therefore, have a key part to play in existing and future officer training programmes. For simplicity, we will refer to the group as 'senior officers' throughout. The relevant officers from all 11 regions were interviewed at length, using a standard questionnaire of 37 questions. In total, a group of 27 key officers, were interviewed.

National and Regional TGWU Officers participating in the research

National Officials

Eddie Haigh	Assistant General Secretary
Regan Scott	National Secretary — Education and Research
Frank Cosgrove	Director of Education
Harry Moore	Education Officer — TGWU Eastbourne Centre
Margaret Prosser	National Secretary — Women
Ray Collins	Administrative Officer

In addition, representatives of the National Officers' Committee and the Officers' National Committee were interviewed:

Officers' National Committee

John Newbold	Secretary
Peter Hopson	Chair
Terry Dunn	ex-Chair

National Officers' Committee

Mick Martin	Secretary
Peter Evans	Chair

See also Chapter 4 and Appendix F for the views of the Officers' Committees.

Regional Officials

Region 1	Ken Reid	Regional Secretary
	Barry Camfield	Regional Organiser
	Pete Batten	Regional Education Officer
Region 2	John Ashman	Regional Secretary
	Bob Purkiss	Regional Education Officer
Region 3	John Joynson	Regional Secretary
	Harry Lees	Regional Education Officer
Region 4	George Wright	Regional Secretary
	Keith Jones	Regional Education Officer
Region 5	Ron Marston	Regional Organiser
Region 6	Eddie Roberts	Divisional Organiser
	Jim Mowatt	Regional Education Officer
Region 7	Davey Shoat	Regional Secretary
Region 8	Joe Mills	Regional Secretary
	Alan Dixon	Regional Organiser
	Tom Nesbit	Regional Education Officer
Region 9	Mike Davey	Regional Secretary
	Phil Scott	Regional Education Officer
Region 10	Mal Snow	Regional Secretary
	Chris Russell	Regional Education Officer
Region 11	Sean Morrissey	Formerly Regional Education Officer

THE SCOPE OF THE INTERVIEW

The subjects covered by the interviews were:

- the importance of training to the role of the officer;
- how the officer's role is defined;
- criteria for officer appointment;
- changes in the officer's role;
- the current training position;
- general proposals for officer training;
- detailed proposals for officer training (induction training, continuing education and training);
- special education facilities (pre-retirement, sabbaticals and longer courses);
- release for training.

The officers were also interviewed about:

- women officers and the union;
- research and back-up for officers;
- computerisation and new technology.

TYPES OF TRAINING

Three types of training were identified as being important to officers:

- functional;
- skills and information;
- awareness.

It was accepted that training was essential to an officer's job, and that need for it was increasing.

THE OFFICER'S ROLE AND APPOINTMENT

Traditionally, officers were negotiators from workplaces with a strong union organisation, but increasingly they were being called on to be organisers and recruiters.

New areas of activity increasing in importance were:

- organisation and recruitment;
- work with youth and schools;
- campaigning and political activity;
- legal and tribunal work;
- individual benefits;
- counselling and the provision of individual services;
- pensions;
- work in the community 'beyond the workplace';
- communication and 'marketing'.

In appointing officers, the TGWU looked for experience in industry first, and involvement in trade union education second; formal education came a poor third or was even a negative factor.

The typical officer, on appointment, had thorough experience in one well-organised industry, but was expected to represent a wide range. He was male, about 30-35 and had a political involvement, basically in the Labour Party.

THE CURRENT TRAINING POSITION

The current training position was a rudimentary national provision at Eastbourne (one week) for new officers. Regional provision was very variable and *ad hoc*. Some regions provided training and continuing education, but others provided none.

Criticisms of the system were the inadequate national programme, particularly for established officers, the lack of specialist education and expertise, and the

absence of any systematic programmes in the Regions. There was also criticism of the lack of a mandatory right to release for education and training for officers. (See also Appendix A.)

GENERAL PROPOSALS FOR OFFICER TRAINING

Proposals for areas which should be covered were:

Functional

- office skills/administration;
- 'prioritising time', i.e. time management;
- law and the various tribunals;
- company accounts;
- work study/job evaluation;
- management techniques/industrial relations;
- pensions;
- the procedures and structures of the TGWU;
- using computers.

> 'To give that officer the best opportunity to go out and do a job of work for the members they represent and to make them as professional as possible'.

Skills

- recruitment and organisation;
- tutoring and public speaking;
- handling the media.

> 'The main aim for education for officers should be to improve their ability to provide a service to the members and to improve their ability to handle situations.'

Awareness

- change in industry;
- political education;
- role of the union and of the union officer.

> 'Education should be provided to help officers to understand and interpret the world we live in, instead of seeing a degree of cynicism and despair creeping into their lives.'

Proposals with regard to the level of provision it included:

National

- induction courses for new officers;
- pensions and other 'national' issues;
- office administration.

Regional

- briefings on specialised subjects;
- courses on 'regional' issues (i.e. geographical- or industry-specific);
- continuing education for established officers;
- 'updating' on specific topics.

There was no support for district education for officers.

It was felt that control of officer education should be firmly in the hands of the TGWU itself. There was no objection to using 'outside experts', as long as they had a sympathy for and, particularly, an understanding of the Union. TUC courses were seen as a useful supplement to a basic in-house provision.

There was little support for the idea of mixing officers with lay representatives, but this had a better chance with 'issues' courses rather than 'skills'.

For *National* courses, the full five-day residential course was felt to be the most appropriate. For *Regional* courses, the 'weekend' (Friday and Saturday, with

Sunday off, or Saturday and Sunday) was felt to be best, with one or two midweek days for briefings.

DETAILED PROPOSALS FOR OFFICER TRAINING

Induction of new officers

With regard to *'hands on' experience*, the following suggestions were made:

- The system of appointment 'change-over' etc. should be speeded up.
- Outgoing and incoming officers should work in tandem.
- The Regional Organiser and/or Regional Secretary should play a greater part in providing an introduction to the workings of the Region and officer's job.

The *induction course* should cover:

- the role of the officer;
- officer administration and time management;
- the detailed workings of the TGWU;
- teaching methods/communication skills;
- law and taking part in tribunals;
- recruitment and organisation.

Continuing education and training

There was some support for an informal 'needs assessment' or counselling carried out via interview with the Regional Organiser and/or Regional Secretary. Formal 'profiling' was felt to be alien to the TGWU.

It was felt that updating and briefings should be continuously on offer to officers. The main subject areas suggested were:

- pensions;
- job evaluation/work study;
- law and tribunals;

- equal opportunities;
- economic issues;
- industrial relations issues.

Special education facilities

There was general support for pre-retirement education for officers, but essentially as a 'bridging' activity to the maintenance of an involvement with the Union and the Labour Movement via the Retired Members' Association.

There was guarded support for sabbaticals and attendance on longer courses, as long as this activity was tied to 'relevant assignments'.

RELEASE AND COVER

There was criticism of the system of release and cover for officers attending courses; this was felt to be haphazard, leading to too much pressure *not* to attend courses. There should be:

- A firm commitment from the organisation to a greater priority for officers' training and education, with a system of provision and the resources to allow officers' attendance. Such a commitment could be in the form of a 'contractual letter' as part of an officer's employment terms, guaranteeing the right to an amount of time off for training, e.g. for one month in five years' service.
- 'Spare-hand' or 'floating' officers to cover the absence of other officers.

POSSIBLE PROVISION STRUCTURE

A structure of provision could include, for example:

- 'hands-on' in the Regions;
- a new officers' induction course;
- after 18 months, an 'advanced course';
- following this, 'customised' courses on specialised subjects (e.g. industries, policies, issues, campaigns, etc.) which officers could attend as part of their normal duties.

SENIOR OFFICERS' VIEWS ON RESEARCH SUPPORT, COMPUTERISATION AND TECHNICAL CHANGE

- Research support varied from region to region. It was generally felt to be fairly basic and *ad hoc*.

- There was felt to be a lack of definition as to the relative roles of National and Regional research support.

- Information from the National level was felt to be too broadly based and in need of editing and 'targeting'. It was also felt to be slow to arrive through the organisation.

- There was scope for officers to be trained in finding and using information.

- There was near-universal dissatisfaction with the way computerisation was being introduced and its emphasis on finance and membership records.

- A wide range of suggestions was put forward as to how computerisation could benefit the Union, in particular:

  — via databases for use by officials, representatives and staff;
  — via direct personal services to the membership.

- It was proposed that key (or interested) officers be trained at National level in computer use and teaching methods, and be given the task of teaching others in the regions.

- It was argued that staff training in the use of computers should be stepped up.

- On the issue of modernisation generally and the officers' role, the senior officers felt that:

  — officers should be aware of industrial change;
  — this awareness would help them defend their members and propose positive alternatives;
  — training was appropriate in these areas.

REGIONAL AND NATIONAL OFFICERS' VIEWS ON WOMEN OFFICERS

- There was general agreement that there were not enough women officers in the Union.

- Changes in 'recruitment targets', e.g. via 'Link-Up', emphasised the need for more women.

- It was felt that it was right that administrative measures should be adjusted to encourage women candidates. There was less support for direct positive discrimination (e.g. a quota of women officers).

- There was disagreement as to whether there should be separate training for women officers. There was general agreement that *all* officers should be educated in issues facing women and trained in handling 'women's issues'.

- There was some support for an 'advanced' course for women which would help them if they were to become candidates for officer appointment.

4. Full-time officers' training requirements: survey of TGWU regional/district full-time officers' views

A major aspect of the research was a comprehensive survey of TGWU full-time officers. A questionnaire was drawn up to establish:

- TGWU officers' views of officer training;
- TGWU officers' experience of training as an officer.

DISTRIBUTION OF THE QUESTIONNAIRE

The questionnaire was distributed through the TGWU to every full-time officer at regional and district level. A supplementary questionnaire for TGWU National Officials was also distributed.

The questionnaire was produced as a quantitative survey of officers' views, based on multiple-choice Yes/No answers to a range of questions. Officers were also asked to add further details if they wished.

The response to the questionnaire was very positive. In all, *281* officers returned completed questionnaires *(58%)*. Of these, *276 (98%)* took the time and opportunity to add supplementary details and areas of concern, extending both the range and quality of the research findings based on this questionnaire.

The most overwhelming finding from the research is that *the vast majority of TGWU full-time officers are not satisfied with the current induction training and updating/continuing education for officers and that they are very much in favour of a comprehensive programme of TGWU officer training being introduced.* This finding can be applied across the board to officers completing the questionnaire, regardless of their Region, allocation, years of service as an officer, age, sex, education, work, lay union experience or union background.

SCOPE OF THE QUESTIONNAIRE

The analysis of the questionnaire findings covers:

- officers' backgrounds;
- officers' views on the role and responsibilities of a union full-time officer;

- officers' views on, and experience of, officer training;
- officer training and education — specific areas of concern for officers;
- other areas of concern for officers:
  - back-up support for officers;
  - role of the officer;
  - problems facing full-time officers.

ANALYSIS OF THE QUESTIONNAIRE

Officers' backgrounds (see also Appendix B)

Most TGWU officers are likely to have a composite allocation, and therefore to be responsible for industries as well as workplaces of which they have no first-hand experience.

Most TGWU officers work alone or with one or two other officers. As well as cutting down on possibilities for informal support, the implications for a policy of release and cover need to be taken into account.

Most TGWU officers are aged 40-59, male, and have a manufacturing or public sector work background. Organisational demands covering the service sector, part-time and temporary workers, women and young workers are therefore again calling, in the main, on officers to work in areas of which they are unlikely to have first-hand experience.

Most TGWU officers come from a manual work background into a job which has mainly non-manual responsibilities. Again, it is likely that most officers on appointment are being asked to work in an environment of which they have not had first-hand experience.

Most TGWU officers left school at the minimum school-leaving age without formal qualifications, with a number coming back to formal education later in life, mainly through the trade union movement. Officers' educational backgrounds tend to imply specific formal TGWU officer education and training needs, as well as the need for facilities for officers to undertake wider-ranging adult education provision as appropriate.

Most TGWU officers have been a shop steward and over half have served as a convener and/or Branch Secretary. Officers are therefore more likely to be able to draw on negotiating and representational skills and experience than on

branch administrative skills and experience in carrying out their responsibilities.

Most TGWU officers have attended trade union education courses as a lay member.

Officers' views on the role and responsibilities of a union officer

On appointment, most TGWU officers face a range of new areas of responsibility, the most common being:

- tribunal cases;
- learning agreements/negotiating arrangements in other industries;
- giving dictation.

These cover a range of officer responsibilities — legal representation, collective bargaining and office administration. The most common addition made to the prepared list was:

- 'coping with the transition from lay to full-time officer'.

Most officers identified that the job of full-time officer will change over the next five to ten years in the following ways:

- more need for professional, efficient servicing of officers;
- more reliance on new technology;
- more individual counselling and advice.

The *lowest priority* identified by officers when faced with industrial modernisation was:

- pushing for industrial modernisation on behalf of the membership.

The *highest priority* was:

- understanding technological change and keeping the membership informed.

About three-quarters of officers identified:

- compulsory induction training,
- policy of continuing education,
- Officer's Handbook,
- staff training,
- training for computerisation of the Union,

as either very important or important in providing back-up support for officer. The most common addition to the prepared answers was:

- 'Closer link with legal department/Union's solicitors'.

The most commonly identified duties officers felt would be improved by training were:

- legal assistance to members;
- servicing and representing of individual members and groups of members generally;
- office administration and organisation of work.

Views on, and experience of, officer training

Eighty-nine per cent of TGWU officers stated they had attended a TGWU or TUC course since becoming an officer.

Lack of time was the most commonly identified obstacle stopping officers attending courses, followed by *lack of cover*. The most common addition to the prepared list was:

- 'Lack of planned education/training priority by the Union for officers'.

Induction

Forty-one per cent of TGWU officers received no induction when they became an officer.

Eighty-one per cent stated that they did not think the induction they had received was adequate in preparing them for the job:

> 'The "throwing in at the deep end" syndrome is ill-prepared, unprofessional, a disservice to the members and leaves a lot to be desired.'

> 'When I was appointed in 1976, it was like jumping off a cliff, and I was on my own from Day 1.'

The TGWU National Induction Course was generally viewed favourably by the 48% of officers attending it. Most common criticisms were that it was:

- too little;
- too late;
- too general.

Working with an officer, the induction experience of 33% of TGWU officers, was generally not viewed favourably unless it was backed up by formal training. Most common criticisms were:

- the officer was not always available;
- bad habits can be picked up as well as good.

Eleven per cent of officers stated they had taken part in regional induction courses. Again, this was not considered sufficient on its own. The most common criticism was:

- more needed.

Other sources of induction training for TGWU officers were:

- TUC course;
- courses attended as a lay activist;
- members of staff;
- other officers.

Induction received that officers considered adequate generally involved a combination of:

- a National course
- a Regional course
- work with another officer
- involvement with lay representatives from allocation/statutory committees.

The most common criticisms of the inadequacy of receiving no induction at all were:

- '[It] did not prepare officers for the job'.
- 'Learning by mistakes is not professional nor is it fair to the members'.
- 'The assumption that experienced lay members who become officers do not need induction is wrong'.
- 'A better induction system is necessary and possible'.

Over three-quarters of officers considered the following subjects would be very helpful or helpful for induction training:

- handling tribunal cases;
- employment law;
- using the media;
- your allocation — agreements, procedures etc.

The most common additions to the prepared list were:

- 'health and safety';
- 'state and social benefits';
- 'research and use of information skills';
- 'tutor training'.

(See Appendix C.)

Eighty-six per cent of officers thought that induction training for officers should be compulsory. The most common reasons for this were:

- 'to prepare officers for the job/to make the transition from lay to full-time officers';
- 'to ensure the Union plans ahead, and officers attend';
- 'to ensure members do not suffer while the officer is learning the trade'.

The most common reason given by the 10% of officers opposed to compulsory induction was that:

- 'induction training should depend on individual officers' requirements, rather than being the same for all'.

Updating and continuing education

Seventy-two per cent of officers stated they had attended courses other than induction since becoming an officer. The most commonly attended were:

- employment/industrial law (35%);
- pensions (27%);
- tribunals (16%);
- politics/economics (16%);
- health and safety (16%).

The most common providers were:

- TGWU/ATGWU — Region (33%);
- TUC/ICTU/STUC/GFTU (32%);
- TGWU National (23%).

Seventy-three per cent of officers attending courses found them 'very useful'.

The most common reasons for not attending other courses were:

- no time;
- no courses offered;
- no cover available.

At least 40% of officers rated every subject on the prepared list of updating and continuing education as being 'of immediate benefit', and no more than 6% found any of the subjects as being 'of no benefit at all'.

The four subjects identified most commonly by officers as being of immediate benefit were:

- *legal changes* (87%);
- *pensions* (79%);
- *tribunal procedures update* (70%);
- *social security benefits* (64%).

The most common additional subjects to the prepared list were:

- 'company accounts and analysis';
- 'tutor training';
- 'health and safety';
- 'multinational companies'.

(See Appendix C.)

Seventy-eight per cent of officers stated that the Union should provide compulsory updating for officers.

Most officers stated they have the opportunity to read 'a few things' or 'most things'. Very few have the opportunity to read 'everything' and a small number stated that they had 'no opportunity to read at all'.

Officer training and education: specific areas of concern for officers

Forty-five per cent of respondents raised issues concerning the overall framework for officer training and education. The most common points were:

- 'There is a need for a commitment from the Union to officer training and education'.
- 'Without adequate cover and release arrangements, officers have no opportunity for training'.
- 'A system is needed to involve officers in identification of training needs'.

Proposals for additional forms of officer education and training provision included:

- an officers' distance learning/home study course;
- an officers' summer school;
- sabbaticals for officers;
- an organised programme of visits to committees, negotiations etc. as an observer.

With regard to educational methods, it was stressed that:

- courses should be professionally run;
- tutors should be skilled, experienced and knowledgeable, and committed to the trade union movement;
- courses should develop and change.

Other areas of concern for officers

Sixty-two per cent of officers raised areas of concern about back-up support for officers, including:

- the need for more professional communication and administrative facilities;
- the importance of up-to-date research and information support;
- the enormous benefits of union computerisation, if it is used as back-up for officers effectively;

- the need for staff support and therefore staff training;
- the benefit of an Officer's Handbook which can be regularly updated;
- the problem of lack of cover for officers for education, holidays and sickness.

Officers also raised concerns over their role in the light of industrial change. These were:

- 'the balance between servicing and organisation/recruitment';
- 'the balance between industrial and political responsibilities';
- 'the increasing time required for individual servicing of members';
- 'the importance of effective communication with members';
- 'the importance of a long-term strategic approach'.

Forty-nine per cent of officers also identified specific problems they face in carrying out their work:

- stress;
- isolation and lack of recognition;
- lack of time;
- lack of black and women officers;
- lack of wider political support;
- demands for specialist knowledge alongside general responsibilities;
- officers' terms and conditions — personnel department.

One officer summarised the problems facing full-time officers and the need for adequate training, education and support as follows:

> 'Time is so tight that we operate in bottlenecks. So we are most of the time chasing time. We are not able to keep abreast of change.
>
> 'Holidays — work is not covered, just emergencies, so we have to catch up on return. We need desperately to be made to take courses.'

TRAINING FOR FULL-TIME OFFICERS: VIEWS OF OFFICERS ATTENDING THE TGWU NATIONAL INDUCTION COURSE

An additional evening session to discuss the research project was organised during the TGWU National Induction Course for full-time officers, to establish the views of new officers attending the course. The officers put forward a series of very useful and detailed points about:

- induction training;
- updating and continuing education.

Induction training

Numerous points were made about induction training.

Hand-over: the general point was made that there is often a gap between the previous officer leaving and the new officer taking over the job. New officers invariably arrive, therefore, to a backlog of work. This not only may make the first few weeks in the job more difficult, but it also makes it harder to find the time to attend training.

Timing of induction: it was suggested that, ideally, the course should take place *before* the new officer takes over, or as soon as possible afterwards.

Hands-on experience: there was some discussion of the value of working alongside the existing officer as part of induction. While recognising that this can be useful, the officers did express some reservations, because bad as well as good habits can be picked up, and because learning as part of a group is better educationally.

Compulsion: it was put forward that basic induction training should be compulsory for all new officers.

Officers' knowledge on appointment: the point was made that it is as bad to assume that officers know it all as it is to assume that they know nothing. Education programmes should take account of this, it was proposed.

Officers' 'style': officers emphasised that education and training should recognise the individual 'style' of officers, and it should not coach officers out of the 'natural ability' which got them where they were.

Other points: in addition, it was put forward that all officers should be given, on appointment:

- *one-to-one training* about the office they are going into;
- an *Officers' Handbook* containing, for example:
  - current TGWU Policy Statements;
  - an outline of each of the 14 Trade Groups, including negotiating procedures;
  - a 'guide' to internal procedures for processing;
- *a visit to Transport House* to find out what is provided, how and by whom;
- an *identification card and car*, to be made available as soon as possible.

The importance of officers having access to *regular health monitoring facilities* was also stressed.

The new officers on this course emphasised the need for a comprehensive induction from Day 1. As one of them put it:

> 'You walk in, get handed the mail, and of course your first worry is the effect this way to starting the job will have on the members.'

Topics to be covered in induction training: specific subjects put foward to be included in induction training for new officers were:

- *Office management — the basics*
  - managerial responsibilities of running an office;
  - dictation;
  - filing;
  - diary work.
- *Tribunals*
  - procedures (how they work);
  - formally what should be done;
  - where to get information from;
  - what type of information is required.

  (*Note*: It was felt that this area of training should involve an officer(s) with experience of how things work in practice as well as a tutor).

- *Law*
  - employment law;
  - health and safety;
  - laws specifically affecting the membership, e.g. Local Government Bill.

- *Management techniques*
  - dealing with attempts to undermine you as an officer;
  - dealing with tactics of trying to break the officer away from the people he or she represents.

- *Change at work*
  - the way work is being restructured.

- *Background information on your allocation*
  - procedural rules/agreements/negotiating arrangements, (e.g. NJICs (National Joint Industrial Councils) engineering, local authorities);
  - the community (e.g. cultural backgrounds, schools/colleges, community groups, employment/unemployment, housing, hospitals).

- *TGWU internal procedures*
  - processing compensation claim forms;
  - convalescent forms;
  - what information is required nationally from officers.

- *Training Agency schemes*
  - processing EC2 approvals forms on the Community Programme, for example.

- *Managing stress of the job*
  - looking at the effect of the job on you and your family;
  - managing the workload — pacing yourself and not burning yourself out;
  - effects of stress.

Updating and continuing education

Aims of continuing education for officers: the general point was made that education has a very important role to play in providing an opportunity for officers to:

- meet other officers;
- get a 'boost';
- gain from the cross-flow of information.

Compulsion: it was stressed that education and training should be seen as part of the job and that *updating should be compulsory.*

The following specific areas were put forward to be included:

- *Updating changes in the law*
  It was stressed that this should not just be explaining what the law says; it should involve a detailed examination of what the law says and *how to deal with it.*

- *Update on changes in TGWU policy*

- *The ideology of your job as full-time officer: strategic planning*
  It was put forward that officers need the opportunity to move on from the reactive role that trade unions can be forced into: e.g. not confronting privatisation/quality circles until they are announced in your industry, even though information is available on what is happening from other industries/workforces/industrial relations theorists.

- *Training for officers in technology matters*
  — the officer's role as a catalyst for change;
  — understanding the implications of changes;
  — what technological changes mean to the members and the Union as a whole;
  — health and safety matters.

As one officer stated:

> 'To be honest, most of my knowledge about new technology comes from *Tomorrow's World*'.

It was also proposed that continuing education for officers should include:

- *A five-year reflection on the officer's job*
  It was suggested that sessions, structured along the same lines as education courses (small numbers with small group discussion, rather than large plenary sessions of all officers and a series of speakers), could provide an important opportunity for officers to reflect on their work. It was further suggested that officers who had been together during induction could be kept together throughout their career, being brought back every five years.

- *Education: voluntary and on offer*
  It was also proposed that officers should have the opportunity to attend a

series of weekend courses to develop specific areas of concern. This should allow officers to choose the subject and develop some specialisation, depending on their own level of interest and commitment. Profiling could help identify the specific areas. For example:

- politics;
- sociology;
- company accounts;
- handling the media;
- how to work out productivity deals, work study, job evaluation.

Training for computerisation of the TGWU

A lot of interest was expressed in the use of word processors and databases to assist officers in their work, and in the potential benefits of computerisation for the Union overall. It was felt that training for officers in making the best use of this technology would clearly be very beneficial.

However, there were some doubts as to the relevance of training for officers, given the way that computerisation is being carried out. As one officer commented: 'There is no need for training — the Union is heading into the 1950s at an alarming rate.'

Specific concerns about computerisation of the TGWU included:

- Officers had not been consulted on what they wanted from the system.
- It was clear that, at present, the system being introduced is about more efficient filing and administration.
- It did not appear that officers would actually be operating the system being introduced.
- As far as they knew, no research had been done into establishing whether the system being introduced was compatible with officers having a personal computer (this is what they would require, with *portable access* to all information stored).

Staff training

The importance of training also being provided for staff was stressed. As one officer put it: 'Staff training is very important, if officers are to do an effective job.'

VIEWS OF THE TGWU OFFICERS' NATIONAL COMMITTEE

Role and appointment of the officer

Education and training for officers was seen as being important both as a means of ensuring a good service to the membership and as an effective way of providing back-up support to the officer.

It was stated that the current pressure on officers to be involved in organisation and recruitment did not recognise their existing pressures and workload, or the nature of their servicing role.

Service to the Union was seen as the main criterion for appointment of officers, along with a past record of trade union education. Formal education was not regarded as a necessary criterion.

Whilst recognising the need for officers to have industrial experience and expertise, and political involvement, as well as the need for more women officers, the Committee did not see the introduction of any specific criteria in terms of trade background, age, sex or politics as being relevant.

Changes in the importance of certain aspects of the officers' role were identified:

- there was an increase in legal demands;
- the overall workload had increased;
- organised workplaces required more servicing;
- a more professional approach was required;
- more individual counselling of members was needed;
- negotiating now took place with better-informed and better-resourced managers.

Training for officers

Three specific areas for improvement of existing officer training were highlighted:

- more comprehensive induction training was needed;

- refresher training, updating and upgrading of skills of existing officers was needed;

- officers should be asked about their training requirements.

Proposals for areas to be covered by officer training were:

- role of the officer;

- legislation;

- the Rule Book;

- industry/Trade Group training;

- pensions;

- relaxation techniques and dealing with stress.

It was proposed that training be provided at National, Regional and District level as appropriate, by the TGWU in conjunction with specialists as necessary. TUC training was seen as appropriate in some cases. It was stressed that tutors should be knowledgeable, and that course methods should be specific to officers.

The Officers' National Committee made the following more detailed proposals:

- Induction training for new officers
  - a hand-over period (three months) with previous officer;
  - regional 'personnel' to be responsible for organising induction from Day 1;
  - a national course to follow up as soon as possible after appointment;
  - an Officers' Handbook to be issued on appointment.

- Continuing education and training
  - based on training needs identified by officers;
  - specialist and with adequate time given;
  - regional and national provision.

Pre-retirement education was seen as crucial, and sabbaticals and longer courses were supported.

Present cover and release arrangements for officers were felt to be totally inadequate; although difficulties were recognised, they were not seen as insurmountable.

Research and information

Much concern was expressed over the current research and information back-up for officers, particularly in the light of:

- employers' research and information back-up;
- other unions' research and information back-up;
- past TGWU research and information back-up.

Detailed proposals for research and information were:

- direct contact between officers and research centrally;
- a facility for instant expert advice;
- more specific and directly relevant research briefings, including analyses;
- better quality printing/photocopying;
- materials available in District offices (e.g. laws, case law updates, reference books);
- reintroduction of TGWU officer-specific back-up, e.g. National Insurance/industrial injury/social security benefits; pay rates and conditions by industry; briefing notes for speakers and writers).

Computerisation and new technology

Training was seen as necessary for:

- the TGWU's computerisation;
- identification of the officer's role in industrial modernisation.

A number of problems with the current computerisation of the TGWU were identified:

- officers do not have direct access to computers/data banks;

- the system has not been designed to provide access to the kind of information that officers require;

- officers' priorities for modern low technology in the office (telephones, photocopying, etc.) need to be recognised alongside computerisation.

The officer's role in industrial modernisation was seen as presenting officers with a major dilemma. Specifically, it was highlighted that the desire to protect members' pay, conditions and jobs in the short term can conflict with long-term aims for future security and prosperity.

Proposals for training for computerisation and new technology included:

- practical training in the use of computers for staff and officers;

- increasing awareness of facilities available and how they can be of benefit to the officer;

- tackling prejudices and anxiety over new technology;

- identification of the wider issues and problems facing officers in the short and long term.

TRAINING FOR TGWU NATIONAL OFFICIALS: VIEWS OF NATIONAL OFFICIALS AND THE NATIONAL OFFICERS' COMMITTEE

An interview was held with Peter Evans, Chair of the National Officers' Committee, and with Mick Martin, Secretary of the Committee. A questionnaire specifically aimed at National Officials was drawn up and distributed to supplement the survey of District and Regional Officers' views.

The response to the questionnaire for National Officials was low, with only 4 out of 20 being returned (20%). The findings in this section are, therefore, not quantified statistically, but are arranged rather as areas of concern, with a series of proposals for improving training support and back-up for National Officials. The findings are drawn in particular from the more extensive interview conducted with the Chair of the National Officers' Committee and from the responses to the questionnaire, and they cover:

- the role of training for TGWU National Officials;

- induction for National Officials;

- updating and continuing education for National Officials;
- other areas of concern for National Officials.

The role of training for TGWU National Officials

Training for National Officials was seen as an important aspect of a general officer and staff training programme.

Induction for TGWU National Officials

Current induction arrangements for National Officials were considered to be inadequate.

It was proposed that induction should include:

- formal hand-over from the previous official;
- induction to Transport House;
- an opportunity to meet other National Officials;
- specific induction training subjects, covering functional, skills and awareness training.

Updating and continuing education for TGWU National Officials

Current procedures for updating National Officials were generally considered to be inadequate.

The TGWU briefings and cuttings service was found to be useful, but it was suggested that briefings should be more regular.

In addition, it was suggested that updating and continuing education provision for National Officials should be introduced, including:

- *Functional/operational training*
  - Labour Party and TUC involvement;
  - legal, benefits, National Insurance, statutory sick pay, pensions arrangements;
  - company organisation and strategy.

- *Awareness training*
  - — trade unions in the 1980s and 1990s;
  - — National Officials' role;
  - — political, economic and technological developments;
  - — discrimination and equality.

- *Skills training*
  - — media.

It is proposed that such training should be provided nationally by the TGWU in a variety of ways:

- regular optional evening sessions, e.g. at Transport House;

- computerised self-education;

- weekend or longer briefings or courses, e.g. at the Eastbourne Centre.

Other areas of concern for TGWU National Officials

It was stressed that officers should be able to identify their own training requirements and supplement the specific provision proposed above, as appropriate.

Where training was to be provided outside of weekdays during the day, it was suggested that it should be optional. It was also proposed that some training may be required by all National Officials, as a matter of urgency, and should, therefore, be compulsory, as part of the officer's workload, with cover being arranged with Regions as necessary.

A role for sabbaticals for National Officials was identified, particularly after many years in post. However, it was stressed that there should be clear guidelines for such a system to be effective and beneficial.

National Officers also expressed support for:

- comprehensive District Officer training;

- adequate research, information and staff support;

- staff training;

- development of union computerisation to support officers.

5. Conclusions and recommendations: a curriculum model of training for full-time officers of trade unions

The FEU curriculum development model identifies four major elements of curriculum:

1. *Analysis of needs and provision.*

2. *Design.*

3. *Implementation.*

4. *Evaluation and review.*

The research project analysed the needs both of trade unions as organisations and of full-time trade union officers themselves. The design of the following model is based on this negotiating process, which highlighted the need for all four elements outlined above to form an integral part of the model at all stages. Thus, an analysis of needs and provision, and strategies of implementation, should be central to the evaluation and review process; in turn, this evaluation and review should be integrated into the overall curriculum design.

The proposed model therefore posits a continuous analysis of needs and provision, from discussions in the preparatory stage to identify the changing requirements of an officer's role, through continuous evaluation and review of provision and implementation, to group evaluation at the end of induction and continuing education courses and the regular needs assessment questionnaire and interview for every officer.

The model

In the light of the findings of this research, we would propose the following model for officer training.

There are three stages to the proposal:

Stage 1: Preparatory measures.

Stage 2: On appointment.

Stage 3: Continuing education and updating.

64

In addition, the curriculum model includes proposals for:

- *pre-retirement education;*
- *research back-up and computerisation;*
- *future development of training for full-time officers;*
- *training for senior officials of trade unions.*

This model is based on the structure and constitution of the TGWU and, therefore, uses a terminology appropriate to that structure: thus the first level is the Branch, then the District, then the Region (of which there are 11 in the UK), and finally the National. Other unions would have to use their own equivalents.

STAGE 1: PREPARATORY MEASURES

(a) *Formal commitment to training for officers*

It should be a requirement of the union that all officers should be expected to attend courses as officers. This expectation should be part of an officer's conditions of employment, and there should be a formal commitment of release and cover for officers, so as to allow Regional Secretaries to arrange their officers' duties.

(b) *Interview panels*

There should be discussions between interview panels and National/Executive Officers in order to identify the changing requirements of an officer's role in the light of recruitment and organisational 'targets', campaigns, equal opportunities, etc.

(c) *Equal opportunities*

In order to encourage more women candidates, an advanced women's course could include sessions encouraging more women to consider applying for the job of District Officer.

In addition, in the light of current moves within trade unions regarding race equality and equal opportunities, there may be a need to extend the range of such advanced courses, as appropriate.

(d) *National and Regional preparation*

Regions should make a commitment, as part of their normal routine, to make arrangements for the arrival of a new officer, and prepare discussions with fellow officers and staff, visits to negotiations, etc.

At National level, every effort should be made to speed up replacement appointments so that an incoming officer and an outgoing officer can work in tandem (where possible). This would assist in the process of induction training and pre-retirement education.

(e) *Officers' Handbook*

Thought should be given to the development of a 'TGWU Officers' Handbook', including such items as union servicing departments, internal union procedures and services, administration and Industry and Trade Group structures.

STAGE 2: ON APPOINTMENT

Regional induction

Immediately on appointment, there should be 'hands-on' induction in the Region:

(a) *Role of the officer in the Region*

The new officer should meet the Regional Secretary and/or Organiser and Trade Group Officers (where appropriate), to be introduced to Regional reporting and administrative procedures, including statutory committees and the officer's role in the Region.

(b) *District Office procedures*

The new officer should be guided by a fellow District Officer into the procedures in the District Office, including relations with staff.

(c) *Programme of visits/observation*

The new officer should be introduced to his or her allocation, including seeing relevant negotiations, an industrial tribunal, etc. (where possible). If possible, this should include a visit to Transport House.

(d) *Introduction to the officer training programme*

The new officer should be guided through the Regional and National training programme (e.g. by the Regional Education Officer) and be given the date for his/her National Induction Course.

National induction course

(a) This should be a mandatory course as soon as possible after appointment. It should be a one-week residential course at the TGWU Eastbourne Centre, covering the following:

- the role of the officer;
- office management;
- law and tribunals;
- communicating/teaching methods and handling the media.

When it is completed, the course should be evaluated by the officers.

STAGE 3: CONTINUING EDUCATION AND UPDATING

Needs assessment

(a) After nine months in post, an officer should fill in a questionnaire looking at training needs and general progress. This should form the basis of a discussion with his/her Regional Secretary and/or Regional Organiser.

(b) This process should be repeated every two years for an established officer, in order to identify training and educational needs. This process could be tied to a formal requirement for course attendance — two weeks every five years, for example.

National courses

(a) As a part of the requirement to undergo training where an officer has not already done so as a lay member, he or she should be encouraged to attend the following advanced National courses:

- pensions;
- tutor training;

- National political;
- multinational companies.

(b) In addition to this, the union should develop three new courses specifically for officers:

- *industrial law and tribunals;*
- *computers, use of research and bargaining information;*
- *advanced course in recruitment, organising and representation.*

(c) *Ad hoc* courses should be provided as necessary (e.g. as in the case of safety issues, campaigns, etc.)

(d) Officers should continue to attend appropriate TUC courses, in particular on handling computers.

Regional courses

(a) Regional Education Officers should be encouraged to provide a continuous programme of briefings for their officers, in particular on:

- *legal changes and developments;*
- *TGWU policies;*
- *regional or local issues;*
- *immediate skills (e.g. a recruitment drive) etc.;*
- *job evaluation/work study;*
- *speaking to schools and youth;*
- *strategic planning for officers.*

(b) The National Servicing Departments should be encouraged to provide centralised briefing materials to assist this process (e.g. on legal changes or pensions). This could also include speakers.

Pre-retirement education

In line with arrangements for officers approaching retirement to reduce gradually the days worked in a week, and the arrangements for pre-retirement counselling and education to be made available to officers, specific proposals for implementing this commitment need to be developed (possibly with the TGWU Retired Members' Association). As stated earlier, such arrangements could be most effective if they were organised to enable an outgoing officer to work in tandem with an incoming officer (see Stage 1 of this model curriculum).

FUTURE DEVELOPMENTS IN TRAINING FOR FULL-TIME OFFICERS

The following proposals for future development of training for full-time officers are intended to form the basis of a long-term training and education strategy within the TGWU and other unions.

1. Thought should be given to developing the following specialist advanced National courses for officers:

   - *law;*
   - *pensions;*
   - *health and safety issues;*
   - *political education;*
   - *organisation, recruitment and representation (management techniques);*
   - *international.*

2. It may be possible to discuss the development of courses for officers looking at 'dealing with stress' and general health issues associated with the work of a full-time official.

3. Some consideration should be given to:

   - an 'open learning' package for officers, using computer-assisted learning, and/or
   - a 'distance learning' or 'home-study' course enabling officers to pursue a specialised individual area of advanced study.

RESEARCH BACK-UP AND COMPUTERISATION

1. The Officers' Handbook would provide basic sources of information.

2. There should be an updating/briefing service for officers from the National servicing departments:

   - legal briefing,
   - negotiating issues,
   - industrial news,
   - political news,

   with emphasis placed on TGWU-specific analysis and information.

3. More emphasis should be given to developing the computer system as the basis of data banks, including interactive systems.

4. While recognising the administrative difficulties associated with such a requirement, a number of officers did identify a need for access to 'instant expert advice', particularly on legal matters. It would appear that development of the union's information service as part of an 'officer access' computerised system may go a long way towards meeting this need.

5. There should be an emphasis on every officer attending some computer training, ranging from a TGWU or TUC National course to one-to-one sessions in a District Office.

6. The computer training programme for staff should be extended beyond finance/administration to the District Office staff.

TRAINING FOR SENIOR OFFICIALS OF TRADE UNIONS

It became apparent during the research that a curriculum model of training for full-time officers of trade unions should include reference to the specific position of senior union officials. The following particular proposals therefore concern training for senior officials of trade unions:

1. Attention should be paid to induction for senior officials into their new role within the union. This could include the organisation of:

   - *formal hand-over from previous official;*

- *opportunities to meet other senior officials;*
- *opportunities to attend specific training courses as identified.*

2. Briefing sessions on current matters of urgency for all senior officials should be held on an *ad hoc* basis as appropriate.

3. In addition, regular optional evening sessions could be introduced for senior officials at the union's head office, covering a range of specialist information and issues. At first, this could be on a trial basis, developing as required.

4. Development training for senior officials in their managerial role was a further area of training need identified.

5. Research and computerisation training developments will also need to be considered in terms of their application to senior union officials.

6. Future developments in officer training involving computer-assisted learning and/or distance learning may also be found to be appropriate back-up for senior officials.

IMPLEMENTATION OF THE CURRICULUM MODEL OF TRAINING FOR FULL-TIME OFFICERS OF TRADE UNIONS

The research into training for full-time officers of trade unions has identified:

1. the key role played by full-time officers within trade unions;

2. the enormous pressures for change which unions are undergoing at the present time and the effects of these changes on the role and training requirements of union full-time officers;

3. the general lack of a comprehensive training and education programme for full-time officers which meets their current requirements;

4. the need for unions to develop training and research back-up for their full-time officers in line with the curriculum model of training, outlined in this chapter;

5. the central importance of a continuous system of evaluation built into the curriculum model of training for full-time officers at all stages; and for this evaluation, through formal procedures of discussion, questionnaire and

interview, to involve both providers of education, training and research and full-time officers themselves;

6. the importance of a pilot programme to carry out the first stage of implementation of the model of curriculum, and to include specific additional evaluation of the model as part of this pilot programme, involving both providers and full-time officers themselves as outlined in (5) above.

These research findings clearly indicate the need for unions to examine and evaluate their current officer training provision. The research further indicates that public further and higher education institutions need to examine their work in meeting the needs identified in this area of adult education, in co-operation with the TUC and/or individual unions.

References and selected bibliography

Allen, V.L. (1957)
Trade Union Leadership: based on a study of Arthur Deakin
(Longman)

Bassett, P. (1987)
'New Trade Unionism: The EETPU'
in *Strike Free*
(Papermac)

Brown, W. and Lawson, M. (1972)
'The training of Trade Union Officers'
(*British Journal of Industrial Relations*, Aug. 1972)

Bullock, A. (1960)
The Life and Times of Ernest Bevin: Vol.I, Trade Union Leader 1881-1940
(Heinemann)

Bullock, A. (1967)
The Life and Times of Ernest Bevin: Vol.II, Minister of Labour 1940-1945
(Heinemann)

Cadbury, A. (1985)
'The 1980s: A Watershed in British Industrial Relations?'
(The Fourth Hitachi Lecture, Institute of Manpower Studies, University of Sussex, Nov. 1985)

Chadwick, A. and Legge, D. (Eds.) (1984)
Curriculum Development in the Education of Adults: A Manual for Practitioners
(FEU)

Clegg, H.A., Killick, A.J. and Adams, R. (1961)
Trade Union Officers: A Study of Full-time Officials, Branch Secretaries and Shop Stewards
(Basil Blackwell, Oxford)

Coser, L.A. (1956)
The Functions of Social Conflict

Donovan, The Rt. Hon. Lord (1986)
Royal Commission on Trade Unions and Employer Associations 1965-68 (*Cmnd. 3623*, HMSO)

Drake, B. (1984)
Women in Trade Unions
(Offset from Labour Research Department 1920, Virago)

FEU (1985)
'FEU Guidance Notes No.7 — Curriculum Development'

Goldstein, J. (1952)
The Government of British Trade Unions: A Study of Apathy and the Democratic Process in the Transport and General Workers' Union
(George Allen and Unwin)

Goodman, G. (1979)
The Awkward Warrior — Frank Cousins: His Life and Times
(Clarke, Doble and Brendon)

Heery, E. and Kelly, J. (1987)
'The Role of Full-time Officers in Trade Union Recruitment'
(Report prepared for TUC, unpublished)

Heery, E. and Kelly, J. (1988)
'A Study of Women Trade Union Officers'
(unpublished)

Horner, D.R. (1971)
'Computers within Trade Unions'
(Ruskin College Labour Studies Diploma Thesis)

Hyman, R. (1971)
The Workers' Union
(Oxford University Press)

Jones, J. (1986)
Jack Jones — Union Man: An Autobiography
(Collins)

Kibel, R. (1984)
'Education in NALGO'
(*The Industrial Tutor*, Vol. 3, No.9., Spring)

Middleton, L. (Ed.) (1977)
Women in the Labour Movement
(Croom Helm, London)

Millar, J. P. M. (1979)
The Labour College Movement
(NCLC Publishing Society)

Mortimer, J. E. and Ellis, V. (1980)
A Professional Union: The Evolution of the Institution of Professional Civil Servants
(George Allen and Unwin)

Noll, A. (1977)
'An Enquiry into Full-time Officering and its Problems in the TGWU — Region 3'
(Ruskin College Labour Studies Diploma Thesis)

Pope, M. and Gilbert, J. (1987)
'Doing Research into Teaching and Learning'
(Department of Educational Studies, University of Surrey)

TGWU (1972)
'The Union in Action'

TGWU (1984)
'TGWU Full-time Officer Training'
(Unpublished)

Touraine, A. and Associates (1965)
Workers' Attitudes to Technical Change
(OECD, Paris)

TUC (1972)
'Training Full-time Officers'

Whitehouse, J. (1973)
'Factors Determining Relationships between Shop Stewards and Trade Union Full-time Officers: An Exploratory Study'
(Ruskin College Labour Studies Diploma Thesis)

Wright Mills, C. (1948)
New Men of Power

Youngman, M. B. (1982)
'Designing and Analysing Questionnaires'
(*Rediguide 12*, Nottingham University School of Education)

Appendix A: Current officer training provision

THE CURRENT POSITION OF OFFICER TRAINING IN THE TGWU

The research produced the following general picture of officer training:

- the National provision is extremely limited and essentially confined to new officers;
- there is a wide variation in Regional provision;
- attendance at outside events (e.g. TUC courses) is *ad hoc* and covers only a small proportion of officers.

National Provision

All Regions indicated that newly appointed officers were sent to the one-week (five-day) New Officers' Course at Eastbourne. The variations in this were:

- Some Regions insisted on attendance at this course, whereas other did not. The result was that some officers missed the course, while others attended only after they had been in post for some time — as much as two years.
- Some Regions made a point of sending established officers on this course 'as a refresher'; others only sent new officers.

The Eastbourne course covers the following subject areas (see Appendix F):

- administration (1 day);
- industrial tribunals (1 day);
- industrial relations/management strategy (1 day);
- using the media (1 day);
- sessions with a senior official (½ day).

Attendance at this course is normally organised by the Regional Secretary in co-operation with the Regional Education Officer.

Regional provision

Region 1

Systematic provision is made in this Region:

- basically two-day courses open to all officers;
- regular involvement in Trade Group and political schools.

Two-day courses have been a regular part of the Region's educational provision since 1987. Courses offered are:

- skills for speaking to schools and youth;
- company accounts;
- pensions (1 day);
- job evaluation;
- branch administration;
- 'Link-up';
- handling the media;
- law;
- management techniques;
- equal opportunities.

In addition, since 1981 there has been the regular involvement of officials on the Regional Political Weekend School (six times a year), and officers are involved as tutors and participants on a weekend school for each Trade Group. A series of half-day briefings on union computerisation were also organised for all officers (see Appendix C).

Region 2

There is no systematic Regional provision for officers in this Region, although officers regularly take part in courses such as 'Organisation and recruitment' or 'Racism'. Officers are being encouraged to learn teaching skills to help with

membership education programmes (see Appendix C). There is an Officers' Annual Conference which can have an educational element within it.

Region 3

There is no established provision, but there have been attempts to organise courses for officers: e.g. 'Evaluation of the political fund ballot' and 'Health and safety provision'. These courses achieved only limited success owing to low attendance. A system of 'briefings' is under consideration by the new Regional Secretary.

Region 4

A system of 'briefings' three times a year exists. These are for one day or a weekend, and cover essentially:

- industrial tribunals/Advisory, Conciliation and Arbitration Service (ACAS) procedures;
- pensions;
- recruitment;
- new legislation (e.g. 1987 Employment Bill).

Region 5

The only provision in this Region is tied on to officers' social 'events', i.e. at weekends. It is normal for a solicitor or MP to address the officers on a current issue. Day briefings are also provided, especially on legal issues.

Region 6

Briefings are provided in Region 6, particularly on issues such as pensions, employment law, criminal injuries and tribunals.

Region 7

No systematic programme exists, but the new Regional Secretary intends to encourage two schools per year, to cover:

- new legislation;
- new management techniques;
- pensions, social security etc.

Region 8

The provision in this Region is based on weekend seminars twice a year to cover issues relevant to officers. There are also specialised briefings, e.g. on statutory sick pay, with an outside specialist from Newcastle Polytechnic or Durham University.

Region 9

There is no systematic provision, but officers take part in the courses provided for lay members and representatives.

Region 10

Provision in this Region included an educational element at the Officers' Annual Weekend Conference: e.g. tribunals, Labour history, the economy and politics. There have been a weekend school on 'Change at Work' and one-day briefings on law and advocacy skills.

Region 11

Officers can take part in seminars provided on Irish-related legal and/or industrial relations issues, by the ATGWU and/or the ICTU (see Appendix C).

Use of TUC provision

Almost all Regions reported some involvement by officers in TUC courses, but the general view was that attendance was 'spasmodic' and that there was no particular identification with the TUC provision on the part of the officers. They treated it as something 'on the shelf', which they might, or might not, 'purchase'. It was not seen as integral to their role, unlike provision from their own union.

The principal TUC courses attended were as follows:

- educational methods;
- law/tribunals;
- social security benefits;
- pensions;
- work study.

There was no evidence of any official having taken part in the TUC 'Computerisation' courses, which may be too recent to have attracted officers.

SUMMARY OF INTERVIEWS CARRIED OUT WITH OTHER INDIVIDUAL UNIONS

AEU

'I am not very happy with it [officer training] and am preparing plans at the moment for a very substantial increase in the amount of education.'

(John Mann, AEU Education Administrator)

Induction

- Hand-over period (minimum 1 week)
- 'Question and answer session'

Updating/Continuing Education

- Some use of TUC courses for officers (e.g. law)
- AEU Shop Stewards' course
- Open learning packages
- *Ad hoc* briefings

ASTMS
(now MSF)

'Our view is that we ought to have a proper programme of officer training including continuing training. Without continuing education then existing officers would miss out on any programme.'

(Sarah Howard, ASTMS Director of Education)

Induction

- 'Meeting people/visiting departments'
- Three levels of officer (Trainee, Industrial and Divisional)

Updating/Continuing Education

- ASTMS officers' courses (e.g. New technology, Health and safety, Media, Financial information, Social security, Statutory sick pay, Changing patterns of work, Using computers)

- ASTMS lay and full-time officers' courses (e.g. Race relations, Equal opportunities for women, Using computers, Teaching methods.
- TUC courses for officers
- Monthly briefings for officers by General Secretary.

EETPU

'Education is the national social cement, but it must also provide its practical, functional role . . . [the] Officer's job is to implement policies decided on by conferences, Executive Councils, Union ballots on policy issues. This role provides the key to understanding the sorts of things that officers might require through training.'

(John Lloyd, EETPU National Education Officer)

Pre-appointment

- EETPU assessment course/interview
- Individual preparation.

Induction

- Hand-over from previous Officer.

Continuing education/updating

- EETPU courses for lay representatives and full-time officers (e.g. Law, Accounts, Tribunals, Pensions, Political education, ten-day 'Team building' course including 'Outward Bound' weekend, Familiarity with computers).

FDA

'To be honest, we do very little education — there has never been a demand for training as such.'

(Derek Stubbs, FDA Assistant General Secretary)

Education Provision

- Reliance on appointing officers who have already received training

- Training budget available, but used rarely (e.g. Industrial Society course on media skills).

FTAT

'Small unions face problems over cost and the fact that outside courses tend to be geared towards the industries where the majority of officers come from. Also, there are those [officers] who think they know it all and others who want to attend many courses.'

(David Coates, FTAT National Officer and Trade Organiser)

Induction

- Fortnight of courses for new officers by Industrial Society covering, e.g. Negotiating skills, Tribunals, Organisation and recruitment.

Updating/continuing education

- GFTU courses (e.g. Trade union communication, Negotiations, Women in industry, The law, Economics)
- Limited attendance at TUC courses
- FTAT Office Briefings (e.g. New technology, Health and safety in funeral trade (AIDS).

GMB

'At the best, we have been paying lip service to officer training as a movement since the '50s and not really doing much about it. What has made it greater priority is the fact that in the '50s, '60s and early '70s it could be argued that there was no need — members were joining in bagfuls. They're not now.'

(Meg Tritton, GMB Co-ordinator of Regional Education)

Induction

- Appointed Officer Grade
- Informal, *ad hoc* procedures in some regions.

Updating/continuing education

- TUC Officer courses (e.g. Media, Local government finance, Employment law, Social security, Pensions)

- Occasional GMB officer courses (e.g. Equal pay)
- GMB Officer Briefings (e.g. Law, Pensions, Social security)
- Working conferences for officers (e.g. Industrial developments)

IPCS
(now IPMS)

'The current approach [to officer training] is too reactive and pretty amateur. We need to ensure people are released to attend and that cover is provided when they are on a course. That would mean training would not be the first thing to go when other priorities arise.'

(Valerie Ellis, IPCS Assistant General Secretary)

Induction

- IPCS Induction Course for all new members of staff
- IPCS 'Initial School' for lay members staff
- Assistant Negotiating Officer Grade

Updating: continuing education

- IPCS Members' Education Programme (e.g. Negotiating, Campaigning, Bargaining issues, Tutor training)
- TUC officer courses (e.g. Employment law using computers)
- Ruskin College four-week course for officers
- Professional training courses (e.g. RIPA rapid reading writing, Civil Service College women's courses)
- Financial support for, e.g., Open University.

NALGO

'We try to carry out what we advocate to employers. There is very considerable commitment to education and training throughout NALGO.'

(Regina Kibel, NALGO Education Officer)

Induction

- Assistant Organising Officer Grade
- 'Training Needs Assessment' based on a 'job profile'

Updating/continuing education

- Prospectus of training modules available to members of staff (e.g. Negotiating skills, NALGO organisation, Assertiveness, Working with people, Public speaking, Management skills, Statistics)
- Some use of TUC courses for officers (e.g. Employment law, Company accounts)
- NALGO briefings on a district basis (e.g. Law changes)
- Support for staff to obtain vocational qualifications

NUPE

'The education system within NUPE is still fairly recent. There is still scope for development, particularly in its provision for officers . . . membership education and political education play a very important role in NUPE's provision.'

(Jim Sutherland, NUPE Education Officer)

Panel Induction Course

- Induction course before taking up the post for panel of appointed officers
- Some use of Trainee Officer scheme.

Updating/continuing education

- TUC officer courses
- Occasional NUPE officer course (e.g. NHS finance, Local government finance, British nationality, Stress management, Union computerisation).
- NUPE Officers' Conference held every year.

SOGAT '82

'You walk in, you're told the area you're covering, you get on with it . . . I know it sounds stupid, but it's not. Most Regional and National Officers have got a minimum of twenty years experience in the industry.'

(Mike Molloy, SOGAT '82 Head of Research and Education.)

Education courses

- Very occasional attendance at TUC courses
- SOGAT '82 occasional briefings for lay and full-time officials (e.g. Industrial relations law).

TASS (now MSF)

'Officers are "strongly encouraged" to attend TUC courses . . . but this does not provide an updating facility on an ongoing basis.'

(Peter Duffy, TASS Organiser)

Updating/continuing education

- TUC courses
- TASS Weekend Officer Briefing (e.g. Legal changes, Equal opportunities, Political education, TASS organisation)
- Annual briefing from the General Secretary plus follow-up briefing.

USDAW

'The union is in the process of transition, which is increasing the demand and need for officer training. Current training provision for officers is inadequate . . . As a union, we need a closer identity with the basic member and shopworker who is not a trade union or political activist — part-time women whose primary interest in life is not work and certainly isn't the union.'

(Colin Thorne, USDAW Education Officer)

Induction

- Induction course for new officers, covering, e.g., Union services, Recruitment/communication/time management skills, Preparation of a wage claim.

Updating/Continuing Education

- TUC officer courses (e.g. Industrial tribunals, Employment law, State benefits, Industrial injuries, Media, Teaching methods)
- USDAW occasional updating briefings (e.g. Youth Training Scheme, Pensions, Maternity regulations).

ATTENDANCE AT TUC COURSES FOR UNION OFFICIALS AND STAFF

The following figures are taken from the *Congress Report* 1986-7.

Table 1: Courses for full-time officers and staff

	Courses		Students	
Subjects	1986-7	1985-6	1986-7	1985-6
Education Methods 1	6	6	98	68
Education Methods 2	1	1	8	12
Industrial Tribunals	4	4	42	48
Employment Law	3	4	36	54
Industrial Injuries	1	1	6	9
State Benefits	2	3	20	35
Pensions 1	2	2	18	21
Pensions 2	1	1	14	13
Work Study	1	1	15	12
Understanding Economics	1	–	8	–
Tackling Racism	1	–	6	–
Using the Media	2	2	18	15
Company Information	–	1	–	13
Bargaining Research	1	–	7	–
Using Figures	–	1	–	7
Totals	26	27	296	307

Table 2: 2½-day residential workshops for union full-time officers and staff

	Courses		Students	
Subjects	1986-7	1985-6	1986-7	1985-6
Equal Pay for Work of Equal Value	1	2	14	30
Low Pay	–	2	–	16
Pensions Update	–	2	–	33
Employment Law Update	1	–	17	–
Tackling Racism	–	1	–	6
Women in Unions	1	–	8	–
Totals	3	7	39	85

Altogether the TUC ran 42 courses in 1986-7, compared with 44 in 1985-6. The number of students attending was 530 in 1986-7 and 537 in 1985-6.

Thirty-seven unions nominated students for TUC courses in 1986-7, compared with a total of 42 in 1985-6.

Appendix B: TGWU officers' backgrounds

Table 3: TGWU officers completing the questionnaire, by Region

Region	*% of all TGWU officers (Feb. 1988)*	*% of all officers completing the questionnaire*	*Difference (%)*
1	27	26	−1
2	5	6	+ 1
3	7	7	–
4	6	7	+ 1
5	8	8	–
6	12	11	−1
7	10	13	+ 3
8	4	5	+ 1
9	7	7	–
10	5	5	–
11	9	5	−4
	100	100	

Table 4: TGWU officers completing the questionnaire, by title/grade

Grade	*%*
Regional Officer	7
Trade Group Officer/Secretary	10
District Secretary	27
District Official	54
Section Officer	1
Divisional Officer	0.5
Not answered	0.5
	100

Note:

Some District Officials also stressed specific additional areas of responsibility they had. These included educational responsibilities and involvement in the union's Women's Advisory structure.

Table 5: TGWU officers completing the questionnaire, by number of years as an officer

Length of Service (Years)	%
0– 5	25
6–10	30*
11–15	21
16–20	11
21–25	6
26–33	6
Not answered	1
	100

* 12% of officers had served for 10 years.

Table 6: TGWU officers completing the questionnaire, by industrial allocation

Industrial allocation	%
Docks and waterways	26
Passenger services	36
Road transport, commercial	45
Civil air transport	15
Public Services	51
Vehicle building and automotive	42
Power and engineering	49
General workers	63
Textiles	32
Chemical, rubber, manufacturing and oil refining	39
Food, drink and tobacco	55
Agricultural and allied	27
Building, construction and civil engineering	42
Administrative, clerical, technical and supervisory staffs	58

Table 7: TGWU officers completing the questionnaire, by age

Years (Age)	*%*
20-29	0
30-39	15
40-49	42
50-59	33
60-65	9
Not answered	1
	100

Table 8: TGWU officers completing the questionnaire, by sex

Sex	*Number*	*%*
Male	270	96
Female	8	3
Not answered	3	1
	281	100

Table 9: TGWU officers completing the questionnaire, by industry worked in before becoming an officer

Previous industry	*%*
Manufacturing	65
Services	5
Public sector	24
Agriculture	2
Manufacturing and services	3
Not answered	1
	100

Table 10: TGWU officers completing the questionnaire, by kind of job held before becoming an officer

Kind of job	%
Manual	81
White-collar	10
Manual and white-collar	4
Managerial	1
Not answered	4
	100

Note:

It is also worth noting that, whilst the majority of women officers involved in the research also came from manual occupations, in terms of industry, most were from the public sector, rather than manufacturing.

Table 11: Age at which TGWU officers completing the questionnaire left school

Age (Years)	%
12	0.5
13	0.5
14	21
15	48
16	19
17	4
18	5
19	1
20	0.5
Not answered	0.5
	100

Table 12: Percentage of TGWU officers completing the questionnaire who have formal qualifications

Officers without formal qualifications	59%
Officers with formal qualifications	40%
Not answered	1%

Table 13: Qualifications of officers completing the questionnaire

Qualification	%
CSE/3rd-Year Leaving Certificate	7
'O' level/School Certificate/Intermediate Certificate/Junior Secondary Certificate	26
Vocational qualification (e.g. City and Guilds/RSA/Pitman/Army and Navy Certificate of Education)	12
Advanced vocational qualification (e.g. 'A' level/ONC/OND/Higher School Certificate/Highers/Labour Studies Diploma)	15
HNC/HND/Cert.Ed./Degree	8
Postgraduate	1

Note: RSA, Royal Society of Arts; ONC/D, Ordinary National Certificate/Diploma; HNC/D, Higher National Certificate/Diploma; Cert.Ed., Certificate in Education.

Table 14: Attendance at college/university/polytechnic by TGWU officers completing the questionnaire

Officers attending further education college as a full-time or part-time student	40%
Officers attending university or polytechnic as full or part-time student (including Labour Movement educational organisations, e.g. Ruskin College)	16%

Table 15: Union background of TGWU officers completing the questionnaire

Background	%
Shop Steward	93
Convener	63
Branch Secretary	57
Branch Chair	48
Branch Committee Member	74
Stand Down Officer	25

Table 16: Trade union education experience of TGWU officers as lay members

Officers attending courses as lay officials/ activists	93%
Officers not attending courses	6%
Not answered	1%
	100%

Appendix C: Officers' views on subjects for induction training, updating and continuing education

Table 17: TGWU officers' views on subjects helpful for induction training [a]

Subject	*Very helpful* [1]	*Helpful* [2]	[1] + [2]	*Quite helpful* [3]	*Not helpful* [4]	*N/A*
Office management	34	26	(60)	17	3	20
Dictation	26	29	(55)	17	8	20
Filing	17	21	(38)	26	10	26
Handling tribunal cases (all kinds)	84.5	9	(93.5)	3	0.5	3
Employment law (including industry-specific laws)	78	12	(90)	3	2	5
Union structure	20	21	(41)	22	9	8
Branch administration	23	25	(48)	18	10	24
Management techniques	40	29	(69)	12	2	17
The changing workforce	26	28	(54)	20	4	22
Processing LDVs, convalescent forms, union benefits, etc.	20	26	(46)	27	5	22
Recruitment	44	25	(69)	9	5	17
MSC scheme approval	17	29	(46)	21	7	26
Stress management	29	22	(51)	13	10	26
The role of the full-time officer	45	21	(66)	12	3	19
TGWU policy	36	27	(63)	13	4	20
Economic and political education	39	27	(66)	13	2	19
Company accounts	44	27	(71)	14	3	12
Productivity deals, work study, job evaluation	46	27	(73)	11	3	13
Negotiating skills	49	23	(72)	9	4	15
Using the media	49.5	30	(79.5)	10	0.5	10

continued

Subject	*Very helpful* [1]	*Helpful* [2]	[1] + [2]	*Quite helpful* [3]	*Not helpful* [4]	*N/A* [5]
Your allocation – agreements, procedures, etc	47	31	(78)	8	1	13
Your allocation – the local community	22	34	(56)	17	6	21
Equal opportunities law and negotiations	42	26	(68)	14	3	15
Understanding developing technologies	39	29	(68)	16	2	14

(1) All the figures in the table are percentages. (Rows across a particular type)

(2) Some officers changed the wording. Not helpful to: Not Required. In view of the context of these ans

(3) N/A – not answered.

In addition to the topics in Table 17, 17% of officers put forward further subjects which they would have found helpful during induction. The most common additional subjects were:

- health and safety;
- state and social benefits;
- research and the use of information skills;
- tutor training;
- TGWU officer back-up facilities and a guide to 'who's who';
- pensions;
- TGWU history;
- public speaking/speed writing;
- gaining recognition – techniques;
- organising effective disputes;
- counselling skills/advising on members' 'social' problems;
- Common Agricultural Policy;
- talking to young people at school on schemes etc. about the Union;
- TUC and how it works;
- parliament and how it works;
- sex and racial discrimination awareness;
- officers' terms and conditions as employees.

Table 18: TGWU officers' views on subjects of benefit for updating and continuing education [a]

Subject	*Of immediate benefit*	*Of limited benefit*	*Of no benefit*	*N/A* [b]
Legal changes	87	10	-	3
Update on tribunal procedures	70	21	1	8
Social security benefits	64	29	1	6
Changing management techniques	43	39	4	4
Political developments	46	40	3	11
Recruitment	57	24	5	14
Economics situation	49	38	2	11
Pensions	79	14	1	6
TGWU policy updates	49	33	3	15
Equal opportunities developments	40	41	4	15
Technological change	42	38	5	15
Developments in trade union organisation	32	33	2	13
Media techniques	46	36	6	12

[a] All the figures in the table are given to the nearest whole number.

[b] 'N/A' was not recorded.

The following additional subjects for continuing education and updating were each put forward by between 3% and 14% of officers suggesting additional subjects:

- company accounts and analysis;
- tutor training;
- health and safety (specific hazards);
- multinational companies;
- computer training: use of computers;
- work with youth: in school;
- international affairs;
- avoiding stress;
- industrial democracy;
- management sociology;
- European Community Law: Common Agricultural Policy;
- trade union and political history;
- Training Agency;
- trade union finances;
- new technology;
- women;
- Retired Members' Association.

Appendix D: Computerisation: research and information back-up for union officers

COMPUTERISATION OF TRADE UNIONS: THE GENERAL PICTURE

Most unions covered by the research were in the process of computerising their administrative systems or had already done so.

Technology training and training for computerisation of the Union were identified as very important. However, there appeared to be no uniform training in computerisation of officers. Provision included:

- *ASTMS* (now MSF): courses organised in conjunction with a college of further education;
- *EETPU*: technology training at its Vocational Training Centre;
- *FDA*: training from the manufacturers of the Union's computer system;
- *AEU*: open learning packages;
- *NUPE*: internal weekend briefing.

Some individual officers had begun to use the TUC computerisation course.

Generally, unions felt that officers needed to be:

- aware of technological change within industry;
- able to use the latest technology effectively in carrying out their responsibilities.

THE SENIOR TGWU OFFICERS' VIEWS

Amongst the Regional and National TGWU officers, there was near-universal dissatisfaction with the way computerisation was being introduced and its emphasis on finance and membership records.

A wide range of suggestions was put forward as to how computerisation could benefit the Union, in particular:

- via 'databases' for use by officials, representatives and staff;

- via direct personal services to the membership;

- the use of computer-aided learning as a useful form of training for officers. It was suggested that centralised officer training programmes covering a range of issues could have an important role to play.

There was support for the training of officers to be in finding and using information.

It was proposed that key (or interested) officers be trained at national level in computer use and teaching methods, and be given the task of teaching others in the Regions; but it was also argued that staff training in the use of computers should be stepped up.

It was felt that there was a lack of precise focus as to the role of the National servicing departments (legal, research, etc.) and it was felt their role as support agencies should be clarified.

THE VIEWS OF TGWU DISTRICT OFFICERS

Sixty-two per cent of officers raised areas of concern about the back-up support for officers, including:

- the need for more professional communication and administration facilities;

- the importance of up-to-date research and information support;

- the enormous benefits of union computerisation if it is used as back-up for officers collectively.

It was felt that the officer could be given a powerful tool to assist in campaigns such as 'Link-up' and to provide direct individual services to members if he or she could be given access to databases and be given (along with staff) training in the use of computer and information systems. There was an urgent need for training in computers to be applied at all levels.

THE VIEWS OF THE TGWU OFFICERS' NATIONAL COMMITTEE

Much concern was expressed by the Officers' National Committee over the current research and information back-up for officers. It was felt that the current TGWU computerisation would not resolve this concern, because:

- it has not been designed to provide support for officers;

- computerisation does not resolve problems over 'low-tech' back-up to officers (telephones, photocopying, etc.), which is considered inadequate.

Training was seen as necessary for:

- TGWU computerisation
  - practical training in use of computers for staff and officers;
  - awareness of facilities available and how they can be of benefit to the officer;
  - tackling prejudices and anxiety over new technology.
- Identification of the officers' role in industrial modernisation
  - identification of the wider issues and problems facing officers in the short and long term.

In addition, the following detailed proposals for research and information were made:

- direct contact between officers and research centrally;
- facility for instant expert advice;
- more specific and directly relevant research briefings, including analysis;
- better quality printing/photocopying;
- materials available in District Offices (e.g. law, case law update, reference books);
- reintroduction of TGWU officer-specific back-up (e.g. National Insurance/industrial injury/Social Security Benefits; pay rates and conditions by industry; briefing notes for speakers and writers).

Appendix E: Women full-time union officers

There was general agreement that there were not enough women officers in the Union. Changes in employment trends, recruitment 'target' and campaigns such as 'Link-up' emphasised this need.

It was felt that it was right that administrative measures should be adjusted to encourage women candidates. There was less support for direct positive discrimination (e.g. quota for women officers).

There was general agreement that all officers should be educated in issues affecting women and trained in handling 'women's issues'.

There was some support for an 'advanced' course for women which could include some elements of encouraging more women to consider becoming candidates for officer appointment, without interfering with the consistitutional right of every member within the Union's rules.

Appendix F: Training and back-up for senior union officials

The interview with representatives of the TGWU National Officers' Committee and the supplementary questionnaire survey of National Officers' views identified dissatisfaction with the current induction, updating and education arrangements for National Officials.

The following main points were made:

Induction for National Officials

It was proposed that induction should include:

- formal hand-over from the previous official;
- induction to Transport House;
- opportunities to meet other National Officials;
- specific induction training subjects covering functional, skills and awareness training.

Updating and continuing education for National Officials

It was proposed that two different types of provision for National Officials be introduced alongside existing arrangements:

- regular optional evening sessions (e.g. at Transport House), supplemented with occasional weekend or longer briefing courses;
- specific briefing sessions covering subjects required as a matter of urgency by all National Officials. It was suggested that these should be part of a National Officer's workload.

SENIOR UNION OFFICIALS

During interviews with senior TGWU officers at National and Regional level, the need for induction and specific training facilities for officers appointed to all senior positions was also identified. The importance of training for senior union officials was also a concern expressed in the interviews with the GMB, ASTMS, and, in particular, NALGO. One senior TGWU officer highlighted

the existing gap in such training provision as follows:

> 'We need to grasp the nettle as an employer and to provide development training for senior officers as our "managers"'.

Appendix G: Research method and procedure

The research was carried out during the year from June 1987 to June 1988 by the Research Officer and Research Consultant, with regular meetings of the Research Steering Group throughout. The research developed out of the work in trade union education of the Department of Educational Studies at the University of Surrey.

The research methods were:

- literature search;
- individual interviews based on a schedule of questions;
- group interviews;
- postal questionnaires;
- course programme content analysis.

The response from each of these research methods was positive.

The research was structured to ensure that each research phase informed the following phases, in terms of both content and method of procedure.

There were four phases to the research, each involving a range of research methods:

Phase 1: Identification of the general picture of officer training

- literature search to establish the role of the full-time officer and practice of training for full-time officers of trade unions;
- interview with the Head of Education Department at the TUC to establish current policy and practice within the TUC;
- interviews with National Officials responsible for trade union education within 12 key trade unions;
- programme content analysis of training for full-time officers.

Phase 2: Identification of policy and practice of officer training within the TGWU

- literature search to establish the role of officers within the TGWU, and past and current training for TGWU full-time officers;

- interviews with:

  — Regional Administrative Officers
  — Educational Specialists

  from each of the TGWU's 11 Regions regarding the role of trade union officials and the relevance of training to their role;

- interviews with key National Officials of the TGWU, also to identify the role of trade union officials and the relevance of training to their role;

- programme content analysis of training for full-time officers within the TGWU.

Phase 3: Identification of TGWU full-time officers' training needs

- literature search of earlier surveys of full-time officers' training requirements and needs;

- postal questionnaire distributed through the TGWU to every TGWU District and Regional Officer to identify their background, experience and views of officer training;

- supplementary questionnaire distributed through the TGWU to all National Officials to establish their experience and views of officer training for TGWU National Officials;

- group interviews with TGWU District Officers attending a TGWU National Induction Course to obtain their views, as new officers, of TGWU officers' training requirements;

- interviews with representatives of the TGWU Officers' National Committee, and of the TGWU National Officers' Committee to establish their views of the role of trade union officials and the relevance of training support to this role.

Phase 4: Development of a curriculum model of training for full-time officers of trade unions

- literature search into curriculum development in adult education;
- analysis of findings from the first three phases of the research;
- drawing up of proposals for implementation of curriculum and transferability to all unions.

PICKUP (Professional, Industrial and Commercial Updating) is an initiative by the Department of Education and Science to stimulate the updating role of education and the part colleges, polytechnics and universities can play in meeting the needs of business for post-experience education and training. Regional Development Agents act as local points for PICKUP in their localities. They link central and local initiatives for adult education and training, co-ordinating and advising on the various elements of the PICKUP programme. For further information please contact:

PICKUP Office
Department of Education and Science
Elizabeth House
York Road
London SE1 7PH
Tel: 071-934 9611

The Further Education Unit (FEU) was established by the Department of Education and Science to give guidance and support to the further education system. FEU advocates and seeks to make possible a more co-ordinated approach to curriculum development, in support of its remit to promote, encourage and develop better learning opportunities in further education. For more information, please contact:

Information Centre
Further Education Unit
2 Orange Street
London WC2H 7WE
Tel: 071-321 0433 ext. 256